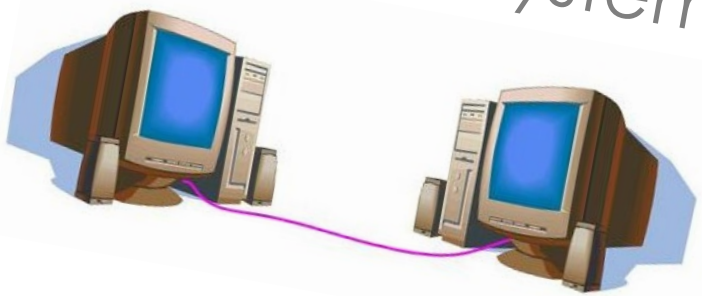
What does it Take to Migrate to a New Candidate Management System?

Between Two Systems – hosted by Chad Pearman



Guest Stars:

- ~~Brad Hamilton, Cisco (1st choice)~~
- ~~Deirdre Jackson, Alpine Testing (2nd choice)~~
- Blair Harris, Alpine Testing (*last resort*)

Alpine Process for Migration

CERTMetrics™

Candidate Management Solutions

Alpine

Testing Solutions

What does it Take to Migrate to a New Candidate Management System?

Scope - Formation

- Identify organizational stakeholders
- Form a representative committee/group
- Discuss and document current state vs. desired future state
- Set tentative group expectations and time frames
  - Requirements
  - System evaluation
  - Contract
  - Go-live

Scope – Requirements Gathering

- Gather and document current system capabilities
  - System strengths
  - Current pain points
  - Determine and document current system requirements
- Identify and document future system requirements
  - List desired fixes/improvements and document
  - Determine future state requirements
- Identify and document security requirements
  - InfoSec, Penetration testing, GDPR,

Scope – Requirements Gathering

- As a _____, I would like to _____ so that I can _____.

- As a candidate, I would like to view my credential progress, so that I can determine which trainings are needed for earning and renewing my credential.

Scope – Organize

- Classify requirements as needs vs. wants
- Identify timeframes for requirement implementation
  - Timeline, Phase 1 (go-live) Phase 2 (6 months after go-live)
- Identify program specific vs. standard functionality

Scope – System Evaluation

- Demonstrations
- Gap Analysis
- Trade-offs
- Hands-on evaluation
  - Sandbox

Scope – Data Migration Strategies

- Data sources
- Data quality
- Credential calculations
  - Rebuild history
  - Start history from migration
  - Hybrid model
- Applications
  - Ongoing
  - Windows

Scope – Summary

- Level of Effort
- Anticipated costs
  - Implementation
  - Annual Costs
  - Customizations
- Anticipated implementation timeline
- Approval to proceed

Scope – Common Questions

- When is the right time to engage Alpine in the scoping process?

- Will Alpine meet all of our custom requirements?

Contract

- Hosted Service Agreement
- SLA
- Security Review
  - InfoSec or other security sign-off
- Security Regulation
  - California Consumer Privacy Act (CCPA)
  - General Data Protection Regulation (GDPR)
  - Standard Contractual Clauses (SCCs) and Binding Corporate Rules (BCRs)
- Alpine
  - Privacy Policy and ISO27001 certification

Contract – Common Questions

- How much time should we anticipate for the contracting phase?

- How does Alpine assist in the security review process?

Implementation

- Managing Expectations
- Building Your Migration Team
- Creating/Managing Schedule
- Preparing for data migration
- User acceptance testing
- Go-live

Implementation – Managing Expectations

- Project kick-off call
  - Define players and roles
  - Review scope and identify gaps
  - Set-up recurring meetings
  - Agree on document/file share protocols
  - Set foundation for strong communication throughout project

Implementation – Building Your Team

- Rely on 1-2 key points of contact at each vendor
  - Identify SMEs & document
  - Pull in appropriate resources as necessary
    - Ad hoc meetings
    - Functionality discussions
    - Testing

Implementation – Creating/Managing Schedule

- Use Contract Scope to define milestones
  - Additional discussions for gap analysis
- Keep easily accessible
- Continuously review & update
  - Assignments
  - Progress/Completed
  - Highlighted areas of concern
- Expect changes

Implementation – Preparing for Data Migration

- Work out agreed-upon format & timeline for delivery
- Document!
- Expect several iterations
  - Differences report(s)
- Full Data Dumps
- Client verification
  - Systems running in tandem

Implementation – User Acceptance Testing (UAT)

- Single place/document for UAT scenarios and outcomes
- Agile Methodology – testing along the way
- Client Training & Documentation
- Sign off pieces regularly

Implementation – Go-Live

- Ensure everyone is on the same page
  - Marketing/communication to candidates
  - Candidate support
  - Blackout period (if applicable)
  - Firm date
- UAT fully completed and signed off
- Special deployment release

Lessons Learned - Implementation

- Quality & Easily Accessible Documentation
- Communication
- Clear Prioritization
- Flexibility
- Manage Expectations