



PROJECT **PERFECT**  
Pty Ltd

# Reference Checklist

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## Document Origin

No.	Author	Department
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## Change History

Version	Date	Changes
1.0	1 Feb 09	Initial Version

## Overview

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### **General comments**

There can be no set of questions to ask in all situations. The following topics are prompts for discussion points with reference sites.

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# The Environment

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**Overview** You need to understand if you are talking to the right person, or people. You also need to know something about the company, how it is organised, and the people using the system. Use some of the questions below:

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- The Interviewee**
- How long have you been with the company?
  - Were you here when the project went live?
  - Were you involved in the implementation?
  - What is your direct involvement with the solution?
  - Who is still around and played a significant role in the implementation?
  - How often would you use it?
  - Do you have much to do with the vendor?
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- The Company**
- Is the company similar to our company?
  - How many sites?
  - What is centralised, and what decentralised?
  - Are the customer bases similar?
  - Are products similar?
  - Is the pricing system similar?
  - Are sales structures similar?
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- The people**
- What is the organisation structure?
  - What is the mix of skilled, unskilled people?
  - What support services do you provide to users?
  - How many people use the solution?
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- Training**
- What sort of training was provided initially?
  - What training do you provide now?
  - Who does the training?
  - What training materials do you have?
  - Where was the training material developed?
  - Do you have super users?
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## The Solution

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**Overview** Now focus on the system itself and how it meets business needs

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**Usage**

- What modules do you have installed?
- What functions do you use/not use?
- Are you heavy/light users of the system?

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**Likes**

- What parts of the system do you like?
- What parts of the system do you dislike?
- What parts give you most problems?

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**Functionality**

- Do you find you have all the functions you need?
- What functions would you like to see?
- What functions do you never or rarely use?
- What functions do you find time consuming or complex?

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**Reports**

- Do you get all the reports you need?
- Do you print, or review on screen?
- Can you create ad hoc reports?
- How do you distribute/print reports?

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# Technical Environment

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**Overview** Looking at how the system performs

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- Environment**
- What sort of database are you using?
  - What sort of hardware are you using?
  - Describe your network?
  - How many staff support the system?
  - What desktop support is required?
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- Reliability**
- Do you have many outages? If so why?
  - Have you had any major system crashes?
  - Do you get many bugs?
  - How quickly are they addressed?
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- Upgrades**
- How often do you receive a patch?
  - How often do you get an upgrade?
  - Are the upgrades in response to your suggestions?
  - Is there a user group who guide development?
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# Implementation

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**Overview** One of the most important areas to cover is implementation. You need to understand what you are in line for, and what you can learn from others.

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- When and how**
- When did the implementation take place?
  - How long did it take?
  - How many modules?
  - How many locations?
  - How many users?
  - Cutover or parallel run?
  - Who assisted you?
  - Did you have a fall back plan at go live?
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- Vendor experience**
- Were you happy with the vendor support?
  - Were you happy with the vendor staff?
  - Did they meet your expectations in terms of time and cost?
  - How long did they take?
  - Were there unexpected events?
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- Staff requirements**
- How many staff were involved full time?
  - How many staff were involved part time?
  - Did you have too many/not enough staff involvement?
  - What areas were hardest to fill?
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- Training**
- How many people were trained?
  - What sort of training was provided?
  - Who did the training?
  - How long before go live did the training take place?
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- Communication**
- How did you communicate with staff?
  - Did the staff understand the impact of the new system?
  - Were they supportive or resistant?
  - If you were doing it again, would you spend more/less effort on staff issues?
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- Lessons learned**
- In retrospect, what would you do differently?
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