NCSHA

HFAs AT THE CENTER

AUSTIN 2018 ANNUAL CONFERENCE & SHOWPLACE

Determining Effective Tech Solutions

Engage and Inform Users

Most people are resistant to change, especially changes in technology. It is important to engage users when assessing new technology solutions.

- Inform systems users that new tech solutions are being evaluated for use at your organization, and that their input will be requested.
- Define and inform users of the desired outcomes to be achieved through the adoption of a new technology/system.

Amanda Lee Gross
Director of Compliance Training, E&A Team – AmandaLee@EandAteam.com

Determining Effective Tech Solutions

Assessment of Tech Needs

- Identify all systems currently being utilized. (don't assume, ask)
- What are the shortcomings of the systems currently being used?
- Who are the users of these systems? (HFA only or HFA and O/As?)
- What are the data export capabilities of the existing systems?
- Examine workflow to identify areas of duplicitous data entry and areas where improvement is needed.

Amanda Lee Gross
Director of Compliance Training, E&A Team – AmandaLee@EandAteam.com

Determining Effective Tech Solutions

Assessment of Risks

- Engage users to identify risks in order to perform effective change management.
- New systems are often disruptive at first, and require users to modify familiar and comfortable working patterns and practices.
- Prepare users and leadership for the notion that until all parties gain a comfort level with the new system, the full value may not be realized

Amanda Lee Gross
Director of Compliance Training, E&A Team – AmandaLee@EandAteam.com

Determining Effective Tech Solutions

Create an Implementation Plan

Set Up

- Draft a policy & procedure manual detailing the requirements of system use.
- System Permissions and Restrictions – Define user roles and determine permissions and any process restrictions.
- Data – Determine what data must be manually entered versus imported

Testing

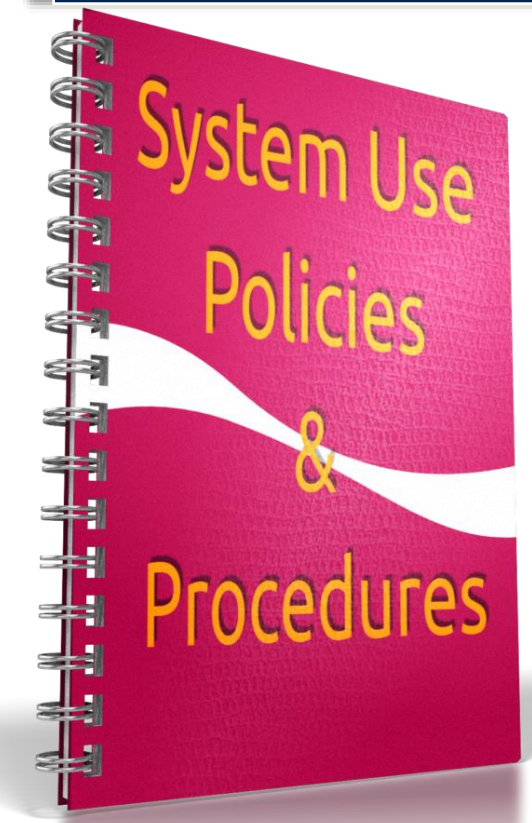
- Workflow Testing
- Existing Projects
- Reports, Form generation
- Pilot Project?

Amanda Lee Gross
Director of Compliance Training, E&A Team – AmandaLee@EandAteam.com

NCSHA

Determining Effective Tech Solutions

Create an Implementation Plan



Finalize Policy & Procedures

- Based on testing results, update policies and procedures
- Include procedures for requesting tech support

Determine Deployment Method & Timeline

- All at once?
- Incremental?
- Pros & Cons to both approaches

Amanda Lee Gross
Director of Compliance Training, E&A Team – AmandaLee@EandAteam.com

E&A TEAM INC.

Determining Effective Tech Solutions

Create an Implementation Plan

- **Training!**
  - Prior to deployment
  - Ongoing
  - Use different platforms

Amanda Lee Gross
Director of Compliance Training, E&A Team – AmandaLee@EandAteam.com