

United States Office of Personnel Management



Human Resources Line of Business

**Agency HRIT Migrations to Shared
Service Centers:
Consolidated Lessons Learned Report**

March 2015

a New Day for Federal Service

Table of Contents

Versions.....	4
1 Introduction	5
2 Overview of Project Phases	6
2.1 Project Management	6
2.2 Preparation & Analysis.....	7
2.3 Design & Development	7
2.4 Implementation	7
2.5 Post-Implementation Evaluation	8
3 Lessons Learned Analysis	9
Report Guide	9
3.1 Planning.....	10
3.1.1 Planning – Lessons Learned Overview	10
3.1.2 Planning – Lessons Learned Detail.....	10
3.2 Guidance	14
3.2.1 Guidance – Lessons Learned Overview.....	14
3.2.2 Guidance – Lessons Learned Detail	14
3.3 Communications	16
3.3.1 Communications – Lessons Learned Overview.....	16
3.3.2 Communications – Lessons Learned Detail	16
3.4 Data Input & Validation	20
3.4.1 Data Input & Validation – Lessons Learned Overview.....	20
3.4.2 Data Input & Validation – Lessons Learned Detail.....	20
3.5 Data Conversion.....	24
3.5.1 Data Conversion – Lessons Learned Overview	24
3.5.2 Data Conversion – Lessons Learned Detail	24
3.6 Testing.....	29

3.6.1 Testing – Lessons Learned Overview	29
3.6.2 Testing – Lessons Learned Detail	29
3.7 Training	32
3.7.1 Training – Lessons Learned Overview	32
3.7.2 Training – Lessons Learned Detail.....	32
3.8 Post-Implementation Support	35
3.8.1 Post-Implementation Support – Lessons Learned Overview.....	35
3.8.2 Post-Implementation Support – Lessons Learned Detail.....	35
4 Conclusion.....	37

Versions

Version	Date	Owner	Description
0.1	07/23/2014	HR LOB	Original Version
0.2	10/31/2014	HR LOB	Updated with additional lessons learned
0.3	01/12/2015	HR LOB	Edits made to final draft
1.0	03/09/2015	HR LOB	Edits made per stakeholder feedback

1 Introduction

The Office of Personnel Management (OPM), as managing partner of the Human Resources Line of Business (HR LOB), oversees the migrations of executive branch federal agencies to Shared Service Centers (SSCs) for the provision of core HR services. As part of this oversight, the HR LOB collects lessons learned from migrating agencies and SSCs following the conclusion of each migration.

This report summarizes and consolidates the lessons learned from every agency HRIT migration that has undergone HR LOB oversight, since the end of the E-Payroll migrations in 2009 to present. It details best practices and issues for consideration that may occur throughout the migration process. This report is recommended to be used as a reference for agencies planning HR and payroll migrations to an SSC.

The lessons learned are organized in two ways: (1) Project Phase, in which the issue is identified, and (2) Migration Activity Category, which relates to the issue that it impacts.

Project Phase: This represents the high-level segment of the project plan during which the issue arises and can be addressed. The project phases are:

1. Project Management
2. Preparation & Analysis
3. Design & Development
4. Implementation
5. Post-Implementation & Evaluation

Migration Activity Category: Each lesson learned is also categorized into an activity category which represents the lower-level migration activities that are impacted by the issue. The migration activity categories are:

1. Planning
2. Guidance
3. Communications
4. Data Input & Validation
5. Data Conversion
6. Testing
7. Training
8. Post-Implementation Support

These categories are common across all HR migrations and represent the major categories of activities that occur during a migration project. The project phases and migration activity categories are defined in further detail in *Sections 2 and 3* of this report.

2 Overview of Project Phases

Project phases describe segments of the project plan, during which multiple types of migration activities are performed. The migration project phases are defined below, along with a short description of the attributes of each phase. In addition, key activities performed by migrating agencies and selected SSCs during each phase are outlined. The project phases are depicted in the figure below:



2.1 Project Management

The Project Management phase is performed to ensure effective oversight and management of the end-to-end migration project. This phase begins with the initiation of the migration project and the formation of the migrating agency's Project Management Office (PMO). The Project Management phase spans the entirety of the migration, from kickoff through the migration go-live date and into post-implementation activities. Project Management activities are typically completed by the agency's PMO and focus on planning, reviewing, and overseeing the activities and work products that the agency and/or SSC must complete during the migration.

Key Activities:

- Oversee all critical and day-to-day migration activities
- Complete Interagency Agreement (IAA) between agency and SSC
- Perform Fit Gap Analysis (e.g., functionality, processes, interfaces, data) to determine whether the agency is a good fit for the SSC system or if system and business processes changes are required
- Develop and disseminate integrated project plan and governance structure with clearly defined roles and responsibilities
- Develop and implement other supporting plans (e.g., communication, change management, risk management)
- Coordinate meetings and communications among the migrating agency's internal stakeholders (e.g., executives, SMEs, HR specialists, employees) and the SSC
- Coordinate meetings and communications among external stakeholders (e.g., OPM, OMB)
- Review and revise of work products on an ongoing basis
- Develop, review, and submit OPM-required deliverables
- Track the progress and completion of activities against the project schedule
- Track spending against the project budget

2.2 Preparation & Analysis

The Preparation & Analysis phase is conducted to develop a comprehensive understanding of the agency's current state environment and requirements, as well as the future state that is expected to be achieved as a result of the migration. The agency works with the SSC to assess the agency's data environment and determine how it can be converted to meet the SSC's system requirements. In addition, the agency's requirements are defined and compared against the capabilities of the SSC to identify gaps.

Key Activities:

- Conduct business process assessment
- Conduct data environment assessment
- Compare agency requirements and SSC system capabilities
- Perform Infrastructure planning

2.3 Design & Development

The Design & Development phase is conducted to address gaps between the migrating agency's requirements and the SSC's system capabilities. This phase prepares the migrating agency and SSC for implementation. After the fit gap analysis and requirements assessment are completed in the Project Management phase, the SSC and agency work together to close identified gaps by resolving data conversion issues, customizing the SSC's system, and/or re-engineering the agency's business processes. In addition, interfaces between agency-specific systems and the SSC are developed and tested. The SSC and agency also work together to provide employees with training that will support the adoption of the SSC system and new business processes.

Key Activities:

- Close gaps identified by fit gap analysis
- Establish agency-wide connectivity
- Develop interfaces between agency-specific systems and the SSC's system
- Conduct User Acceptance Testing
- Provide employee training
- Perform system development and testing
- Perform data conversion and validation

2.4 Implementation

The Implementation phase is primarily focused on the go-live, which is the official transfer of the migrating agency's data into the selected SSC's system for processing. During this phase, testing is performed to assess the accuracy of the data conversion and the ability of the agency employees to effectively access the SSC systems. The SSC may use its previous migration experience to guide the migrating agency through the Implementation phase, mitigating risks during the go-live processes.

Key Activities:

- Conduct Parallel Testing
- Complete go-live checklist
- Perform all required go-live activities

2.5 Post-Implementation Evaluation

In the Post-Implementation Evaluation phase, the SSC supports the migrating agency to assess the results of the go-live. The migrating agency and SSC identify and resolve outstanding issues from the migration. The SSC provides increased functional and IT support for an agreed upon timeframe following the go-live date.

Key Activities:

- Provide functional and IT support to system users
- Complete transition activities
- Close-out migration activities and programs

3 Lessons Learned Analysis

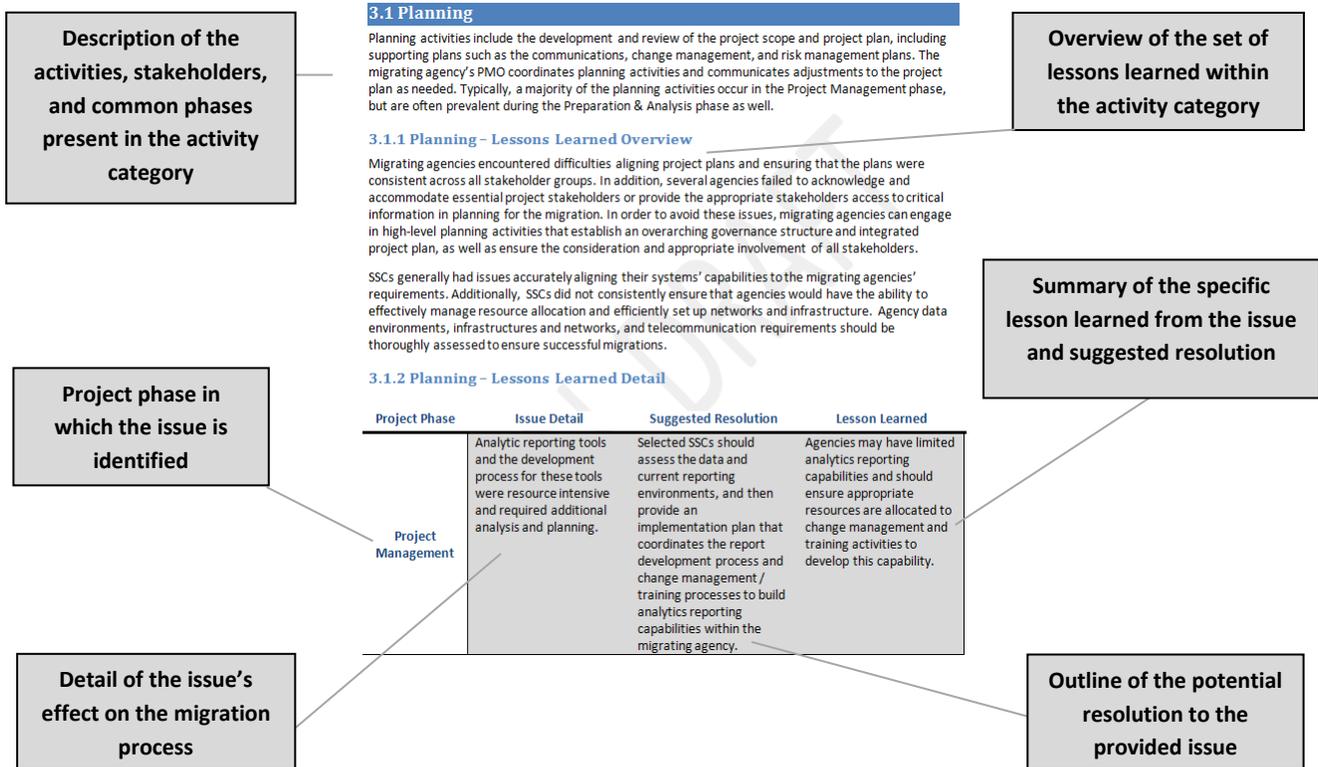
The HR LOB categorized the following lessons learned into the eight migration activity categories. The migration activity categories represent related groups of actions that are performed which may span or occur across multiple phases of the migration project. Each of these categories is defined below, with a description of the activities performed within the category, the stakeholders involved, and the project phase in which the activity category typically occurs.

The lessons learned are organized into tables within each of the eight activity categories. These tables contain four columns: the project phase that the issue occurs in, a description of the issue, a suggested resolution to the issue, and the lesson learned resulting from the issue. In addition, the cumulative lessons learned within each category are summarized below the table.

- [3.1 Planning](#)
- [3.2 Guidance](#)
- [3.3 Communications](#)
- [3.4 Data Input & Validation](#)
- [3.5 Data Conversion](#)
- [3.6 Testing](#)
- [3.7 Training](#)
- [3.8 Post-Implementation Support](#)

Report Guide

The following figure illustrates how to navigate the content within each of the migration activity categories.



3.1 Planning

Planning activities include the development and review of the project scope and project plan, including supporting plans such as the communications, change management, and risk management plans. The migrating agency’s PMO coordinates planning activities and communicates adjustments to the project plan as needed. Typically, a majority of the planning activities occur in the Project Management phase, but are often prevalent during the Preparation & Analysis phase as well.

3.1.1 Planning – Lessons Learned Overview

Migrating agencies encountered difficulties aligning project plans and ensuring that the plans were consistent across all stakeholder groups. In addition, several agencies failed to acknowledge and accommodate essential project stakeholders or provide the appropriate stakeholders access to critical information in planning for the migration. In order to avoid these issues, migrating agencies can engage in high-level planning activities that establish an overarching governance structure and integrated project plan, as well as ensure the consideration and appropriate involvement of all stakeholders.

SSCs generally had issues accurately aligning their systems’ capabilities to the migrating agencies’ requirements. Additionally, SSCs did not consistently ensure that agencies would have the ability to effectively manage resource allocation and efficiently set up networks and infrastructure. Agency data environments, infrastructures and networks, and telecommunication requirements should be thoroughly assessed to ensure successful migrations.

3.1.2 Planning – Lessons Learned Detail

Project Phase	Issue Detail	Suggested Resolution	Lesson Learned
Project Management	Analytic reporting tools and the development process for these tools were resource intensive and required additional analysis and planning.	Selected SSCs should assess the data and current reporting environments, and then provide an implementation plan that coordinates the report development process and change management / training processes to build analytics reporting capabilities within the migrating agency.	Agencies may have limited analytics reporting capabilities and should ensure appropriate resources are allocated to change management and training activities to develop this capability.

HRIT MIGRATIONS: CONSOLIDATED LESSONS LEARNED

Project Phase	Issue Detail	Suggested Resolution	Lesson Learned
Project Management	The agency had to rush several non-core HR system implementation activities in preparation for Parallel Testing and go-live because the project schedule for the non-core implementations was not aligned with the core HR services implementation schedule.	The project management plan for the non-core and core HR system implementations should be aligned. The planning for non-core service implementation should allow for sufficient time for preparation before go-live.	Migrations that are implementing both core and non-core HR services should ensure that project management of all services being migrated are aligned to an integrated project schedule.
	There was an inconsistent HRIT strategy for integrating the agency's legacy systems with the SSC.	There should be a central, agency-wide strategy for integrating the SSC's system with all existing and future agency-specific HR systems.	A consistent HRIT integration strategy enables a successful and efficient integration of the agency's and SSC systems.
	Decisions were not consistently made in a timely manner.	An effective governance structure that encourages decisions to be made at the lowest possible level, while allowing elevation of important or contentious issues, should be part of the project structure.	Streamlined decision making processes, supported by effective governance, allows for decisions to be made in a timely manner.
	Issue tracking and resolution was difficult to manage due to the size and complexity of the migration.	The selected SSC, with support from the migrating agency, should establish effective means to monitor, control, and resolve issues during the migration.	Issue tracking, control, and resolution are critical to the successful management of migrations.
	All migration activities should be included in the project schedule, which should also identify the entity responsible for each activity.	This is a best practice that should be followed.	Project plans that contain all migration activities are critical to the successful management of migrations.

HRIT MIGRATIONS: CONSOLIDATED LESSONS LEARNED

Project Phase	Issue Detail	Suggested Resolution	Lesson Learned
<p>Project Management</p>	<p>Project management best practices were not consistently applied, which resulted in inadequate staff resources, not enough involvement and education of management, and communications issues during the project.</p>	<p>The project management teams should periodically review areas of concern with the migration and make adjustments as necessary.</p>	<p>Periodic review of key migration issues and enhanced project management could have mitigated several issues that occurred during the project.</p>
	<p>The migrating agency and SSC developed an integrated project plan that was used to track the overall status of the project.</p>	<p>This is a best practice that should be followed.</p>	<p>Migrating agencies and SSCs should develop and manage the project using a detailed and integrated project plan.</p>
<p>Preparation & Analysis</p>	<p>The agency's back office payroll provider was unable to access the agency's labor cost file.</p>	<p>Migrating agencies' PMOs should develop a checklist to ensure that all appropriate entities have access to the necessary files and systems.</p>	<p>Migrating agencies' PMOs are responsible for granting necessary parties access to data and files that are critical to the completion of the migration</p>
	<p>The SSC's infrastructure and network planning was not detailed at the beginning of the project, which caused access issues for the agency's non-core systems.</p>	<p>SSCs should assess the customer's overall network architecture and develop a plan to integrate its systems with the agency's infrastructure. The agency and SSC should collaborate to develop an IT technology roadmap and upgrade cycle plan.</p>	<p>An early assessment of the agency's infrastructure allowed the agency and SSC to develop a comprehensive plan to integrate the SSC's system with agency-specific systems.</p>
	<p>Additional assistive technologies and resources needed to achieve 508-compliance were identified during development and testing, which strained agency and SSC resources.</p>	<p>At kickoff, migrating agencies and selected SSCs should agree on the exact assistive technologies and versions that will be used in order to determine whether the SSC and integrated systems are 508-compliant.</p>	<p>Resources specific to 508-compliance are best organized and planned at the beginning of the project to minimize potential issues and resource constraints.</p>

HRIT MIGRATIONS: CONSOLIDATED LESSONS LEARNED

Project Phase	Issue Detail	Suggested Resolution	Lesson Learned
<p>Preparation & Analysis</p>	<p>The agency needed to schedule extensive meetings to determine the appropriate sizing of the telecommunications line due to insufficient advisory and planning from the SSC.</p>	<p>SSC IT departments should play a more active role in the planning phase to offer clear recommendations regarding agencies' telecommunications options.</p>	<p>Active SSC involvement in telecommunications planning enables more efficient use of agency resources.</p>
	<p>The selected SSC did not have prompt access to agency employees' eOPFs.</p>	<p>Migrating agencies should work with their previous provider and selected SSC to agree upon the process for the release of the eOPF from the previous provider prior to go-live.</p>	<p>Proper planning of SSC access to critical employee data files is necessary to ensure a successful go-live.</p>
	<p>The agency was unaware of the specific payroll reports that its previous provider needed to deliver to the selected SSC during the migration.</p>	<p>Migrating agencies should solicit payroll reports from the previous provider early in the migration process in order to prepare for audits and Parallel Testing.</p>	<p>Payroll reports from the previous provider may be required to complete audit and testing activities.</p>
	<p>Collaboration tools were not used consistently throughout the course of the migration project, reducing their effectiveness.</p>	<p>Collaboration tools should be used to the fullest extent in order to facilitate information sharing across the migration project.</p>	<p>Collaboration tools are an effective resource for managing migrations and should be used consistently.</p>
<p>Implementation</p>	<p>During the initial go-live period, the migrating agency requested the selected SSC to complete a significant number of T&A corrections for pay periods prior to go-live.</p>	<p>Selected SSCs should encourage migrating agencies to complete a thorough validation of their T&A submissions prior to go-live.</p>	<p>Completing T&A corrections for timecards submitted prior to go-live requires a significant level of effort from the selected SSC and should be minimized if possible.</p>

3.2 Guidance

Guidance refers to all actions in which the agency, its employees, or the SSC need to be assisted and require additional clarification to effectively complete a migration process or activity. Activities in this category often include SSC guidance regarding its systems, oversight of the agency employees by the agency leadership team, and assistance by OPM to either entity. Guidance activities, similar to Planning activities, frequently occur in the Project Management and Preparation & Analysis phases.

3.2.1 Guidance – Lessons Learned Overview

Migrating agencies commonly experienced difficulties obtaining the necessary resources that have sufficient knowledge and expertise to oversee and manage migration efforts. A more careful assessment of required resources for specific activities (e.g., change management planning) would improve resource allocation across the agency for each of its migrating bureaus. SSCs encountered similar issues regarding the lack of adequate resources for key migration activities.

Migrating agencies and selected SSCs can work together to mitigate issues that arise due to a lack of technical or business process expertise by involving SMEs in critical activities and the related decision making processes.

3.2.2 Guidance – Lessons Learned Detail

Project Phase	Issue Detail	Suggested Resolution	Lesson Learned
Project Management	The migrating agency was provided with insufficient guidance regarding documentation for which OPM required “wet” signatures.	OPM should provide more detailed guidance to agencies for instances where it requires specific actions (e.g., wet signatures).	Migrating agencies may need additional guidance in fulfilling some of the requirements established by OPM.
	Bi-weekly reports created during the migration project did not effectively identify errors and/or were not properly used to resolve issues.	Selected SSCs should work in collaboration with agencies to review error reports and identify significant issues, as well as develop a validation process to ensure issues are resolved.	Efforts to identify errors and resolve issues should be collaboratively addressed by selected SSCs and migrating agencies throughout the migration process.
	The absence of SMEs during critical technical decisions required the repeated explanation of certain process applications.	Project managers should engage SMEs to participate in discussions that require technical expertise.	Decisions that involve technical system process knowledge should not be made without involvement from SMEs.

HRIT MIGRATIONS: CONSOLIDATED LESSONS LEARNED

Project Phase	Issue Detail	Suggested Resolution	Lesson Learned
<p>Project Management</p>	<p>Bureaus lacked the necessary resources to perform change management activities at the bureau level.</p>	<p>Working groups should be established at the bureau level to provide support for change management activities.</p>	<p>Specific bureau-level activities may require supplemental resources from the project team.</p>
	<p>The primary developer on a critical system implementation left the project suddenly.</p>	<p>Project managers should maintain sufficient resources that can continue to operate despite turnover on the project team.</p>	<p>Project leadership teams are responsible for including contingency plans that account for resource changes during the development of HRIT systems.</p>
	<p>After the migration, bureau-level managers expressed that the migration was not sufficiently staffed.</p>	<p>Project resources should be assigned to support specific bureaus in order to limit the workload on individual bureaus.</p>	<p>Sufficient bureau-level project resources are required in order to limit the burden on specific resources and ensure effective communications between the migrating agency and selected SSC.</p>
	<p>In many cases, PMOs have very little knowledge of either the technical or HR aspects of the project.</p>	<p>Project leadership teams should include resources with experience in both HRIT systems and HR business processes.</p>	<p>Leadership must have knowledge of all aspects of the project in order to make decisions effectively and manage the project properly.</p>
<p>Preparation & Analysis</p>	<p>The migrating agency set up route paths that were overly detailed and complex, requiring extensive time for set up and testing.</p>	<p>Selected SSCs should provide guidance to agencies that do not have sufficient experience working with electronic route paths.</p>	<p>Selected SSCs may be able to provide helpful guidance to agencies regarding the set up and testing of route paths.</p>
<p>Design & Development</p>	<p>There is limited guidance that delineates the roles and responsibilities of the former and selected SSCs for migrations from one SSC to another.</p>	<p>The roles and responsibilities of the former and selected SSC should be clearly established and agreed upon prior to the start of the migration.</p>	<p>Set agreements and guidelines should be established to define the roles and responsibilities of all stakeholders for migrations from one SSC to another.</p>

3.3 Communications

Communications activities include all contact between the migrating agency and the selected SSC related to the sharing of information and identification of project issues. The executive management of both the migrating agency and the selected SSC are often responsible for communications activities. Interactions between OPM and project team leadership, as well as executive leadership at the agency and SSC are significant to the Communications activity category. Additionally, this category contains any activities related to the communication of information to employees at the migrating agency. The Communications activity category manifests itself mostly in the Project Management phase but is apparent in every phase of the migration.

3.3.1 Communications – Lessons Learned Overview

Migrating agencies frequently identified difficulties engaging their employees and managers in a meaningful dialogue in order to convey essential information about the migration. Some of issues identified were related to the communication of agency requirements to the SSC, which if not explained properly can significantly impact the success of the migration and the functionality that the agency receives from the SSC’s system. Succinct communication networks, direction from agency management, and open collaboration with all project resources will support the successful completion of the migration.

Agencies also identified issues arising from the selected SSCs’ management of communication efforts, including overall lack of engagement and failure to inform agencies and their employees of important project information. SSCs’ full engagement and disclosure of important issues to the agency’s PMO would encourage collaboration and contribute to the success and efficiency of migration efforts.

3.3.2 Communications – Lessons Learned Detail

Project Phase	Issue Detail	Suggested Resolution	Lesson Learned
Project Management	The migrating agency did not work directly with all relevant components of its HR staff, resulting in inconsistent communications across the agency.	Agency migration teams should work with all relevant components of its HR staff to enhance communication.	Agency migration teams should provide consistent communications and work with all relevant HR staff throughout the migration.
Project Management	Ineffective communication resulted in changes to training topics during training instead of prior to its start.	Agency-specific training modifications should be identified and communicated early in the migration process to ensure that training materials are prepared on schedule.	Timely communication is essential to the proper implementation of changes to training materials.

HRIT MIGRATIONS: CONSOLIDATED LESSONS LEARNED

Project Phase	Issue Detail	Suggested Resolution	Lesson Learned
	The migrating agency experienced limited engagement from the SSC, which resulted in several unexpected issues during the migration.	Selected SSCs should establish and maintain regular communications with the migrating agency regarding the migration's progress and issues.	Full SSC engagement and effective communication minimizes unexpected issues for migrating agencies and supports the effective management of the migration project.
	A Town Hall meeting was scheduled too soon after Parallel Testing management reports were produced and thus did not allow enough time for the PMO to analyze and accurately present the results to other agency employees.	Town Hall meetings should be scheduled two weeks or more after Parallel Testing reports are created so that the contents can be more thoroughly compiled and analyzed.	Town Hall meetings add value for employees and agencies, but there needs to be sufficient lead time after Parallel Testing reports are produced in order to determine how to best present materials to employees.
	Agency bureaus underestimated or had difficulty obtaining the necessary resources for some aspects of the migration, especially communication activities.	For a large scale IT implementation, each bureau should have a sufficiently staffed project team that is dedicated to migration activities.	Dedicated and sufficiently staffed bureau-level migration project teams are essential to conducting effective communication throughout the migration.
	Turnover and changes to the migrating agency's technical SME resources required the selected SSC to communicate key project information several times, reducing efficiency.	All relevant stakeholders should be included on key project communications as early in the project lifecycle as possible in order to mitigate duplicative communications.	Turnover on the project teams may require key information to be communicated several times if it is not effectively managed and delivered to new team members.
Project Management	Decision making in many government agencies is a time consuming and arduous process, which can lead to delays in the project schedule and increase the difficulty of communication between the migrating agency and SSC.	The migration teams should have authorization to make basic project decisions autonomously in order to maintain the project schedule and enable prompt communications between the migrating agency and SSC.	Timely decision making and communication is essential for effective collaboration between the migrating agency and selected SSC.

HRIT MIGRATIONS: CONSOLIDATED LESSONS LEARNED

Project Phase	Issue Detail	Suggested Resolution	Lesson Learned
	<p>Agency-side executive management that participated in selecting the SSC did not effectively communicate with its PMO regarding the overarching strategy and goals of the migration.</p>	<p>Goals for the migration should be clearly defined in the kickoff meeting, with a detailed look at the project scope and schedule.</p>	<p>Project leadership should understand the scope and goals for the project prior to kickoff in order to enable effective communication between the migrating agency's leadership and the SSC.</p>
	<p>The migrating agency did not effectively specify and communicate their requirements to the SSC. As a result, the SSC was not able to fulfill all of the agency's requirements.</p>	<p>Migrating agencies should work closely with selected SSCs early in the migration process to define their requirements.</p>	<p>Migrating agencies' communication of requirements and goals to the SSCs is essential to a successful migration.</p>
<p>Preparation & Analysis</p>	<p>Employees of the migrating agency were unaware of pay differences that took effect upon migration to a new system.</p>	<p>SSCs should document pay and other differences identified during testing in order to inform agencies of these differences.</p>	<p>SSCs should identify specific pay differences during testing and notify migrating agencies to enable effective communications to the agency employees.</p>
	<p>OPM's internal systems were not updated upon the migration's completion.</p>	<p>The selected SSC, migrating agency, and OPM should work together to ensure that data is updated on OPM's internal systems as necessary.</p>	<p>Communication across the SSC, agency, and OPM is necessary to ensure that all relevant IT systems are updated.</p>
<p>Preparation & Analysis</p>	<p>The selected SSC informed the migrating agency that the agency's legacy T&A system data would be available in the SSC's data warehouse; however, near the end of the migration, the migrating agency was informed that it would not be available.</p>	<p>The SSC should provide accurate information regarding the availability of the migrating agency's legacy system data.</p>	<p>Communication of data availability should be clarified before the start of the migration.</p>

HRIT MIGRATIONS: CONSOLIDATED LESSONS LEARNED

Project Phase	Issue Detail	Suggested Resolution	Lesson Learned
	Specialized IT networking teams from the migrating agency and SSC held meetings to agree upon the telecommunications infrastructure that was established to support the migration.	This is a best practice that should be followed.	Achieving agreement on the telecommunications infrastructure that will be used to route data/information to the selected SSC is critical to the overall success of the migration.
Implementation	The selected SSC did not effectively communicate limitations to components of its system that required the agency to develop complex workarounds to enable some business processes.	The selected SSC and agency should have detailed communications and share technical documentation to ensure that the capabilities of the SSC system are known prior to the migration.	SSC systems may not meet the detailed technical requirements of all agencies and limitations should be clearly communicated in order to mitigate issues and prepare effective workarounds.
Post Implementation Evaluation	Regular reoccurring meetings between the migrating agency and SSC after go-live were successful in resolving issues and maintaining communications.	This is a best practice that should be followed.	Migrating agencies and SSCs should continue to meet post-implementation in order to resolve outstanding issues from go-live and maintain communications.

3.4 Data Input & Validation

Data Input & Validation encompasses all manual data entry and cleansing of existing data in either the agency’s legacy HRIT system and the SSC’s system. The majority of the actions in this category are performed by agency and SSC SMEs who are responsible for overseeing data migration activities and resolving data discrepancies and errors. Data Input & Validation spans across all of the project phases, but is concentrated in the Preparation & Analysis and Design & Development phases, where discrepancies and interface issues arise most frequently.

3.4.1 Data Input & Validation – Lessons Learned Overview

Migrating agencies cited issues regarding errors in agency data that is transferred from legacy HRIT systems. An accurate assessment of existing data errors, continuous monitoring of data discrepancies, and completing mock data conversions prior to the go-live are all valid methods for agencies to improve data quality and minimize errors.

SSCs identified issues related to the structure of data templates and standards rather than individual data element discrepancies. SSCs should work closely with agencies to ensure interfaces with agency-specific systems meet agency requirements and are using cleansed, accurate data.

3.4.2 Data Input & Validation – Lessons Learned Detail

Project Phase	Issue Detail	Suggested Resolution	Lesson Learned
Project Management	Review of bi-weekly SSC validation reports failed to properly identify data errors.	SSCs should develop efficient programs and reports to improve the validation process in order to effectively resolve data issues.	Effective data validation processes are essential to reducing data errors and resolving issues.
Preparation & Analysis	Manually entered bureau-specific data from the migrating agency was not sufficiently reviewed and tested to identify errors.	Selected SSCs should work with migrating agencies to ensure data loads are automated when possible. Selected SSCs and migrating agencies should develop a quality assurance process and build it into the project plan to ensure errors are reconciled prior to go-live.	Data should be loaded via an automated electronic process when possible; however, when manual loading is required, data should be tested rigorously to ensure accuracy.

HRIT MIGRATIONS: CONSOLIDATED LESSONS LEARNED

Project Phase	Issue Detail	Suggested Resolution	Lesson Learned
<p>Preparation & Analysis</p>	<p>Many agencies underestimate the extent of the errors present in their data and fail to allot sufficient time for data cleansing prior to the conversion process.</p>	<p>During the Preparation & Analysis phase, migrating agencies should complete a data quality assessment and build a plan to begin cleansing the data within their legacy systems. Additional staff should be identified to focus on investigating and reconciling the errors to ensure the conversion process runs smoothly.</p>	<p>An accurate assessment of data error frequency and cleansing requirements increases efficiency and expedites the conversion process.</p>
	<p>The migrating agency's failure to cleanse financial data prior to implementation of the HRIT system resulted in unresolved data inconsistencies.</p>	<p>SSC system experts should work with migrating agencies to provide system data requirements and data clean-up guidance to ensure migrating agencies fully understand the data preparations necessary for migration.</p>	<p>Data cleansing is best performed in preparation for implementation in order to avoid data inconsistencies.</p>
	<p>Attributes from the migrating agency's employee data (e.g., hyphenated names) were not correctly converted by the selected SSC.</p>	<p>Migrating agencies should work with SSC system experts to identify employee data functional requirements and conduct testing to identify potential conversion issues related to employee data prior to migration.</p>	<p>Errors may occur during employee data conversion and the final data sets should be validated for accuracy.</p>
<p>Design & Development</p>	<p>The migrating agency identified a number of data input errors (e.g., TSP, birthdate, retirement option).</p>	<p>Migrating agencies should implement a data input verification process.</p>	<p>A data verification process can be used to identify data input errors.</p>

HRIT MIGRATIONS: CONSOLIDATED LESSONS LEARNED

Project Phase	Issue Detail	Suggested Resolution	Lesson Learned
<p>Design & Development</p>	<p>Numerous errors occurred when the migrating agency's labor cost file was received and processed by the migrating agency's financial management back-office provider. Cost accounting information was not captured in the labor cost file for various transactions (e.g. awards, lump sum payments). There was insufficient time to perform a thorough test of the Labor Cost File in the selected SSCs system and the migrating agency's back-office support provider.</p>	<p>Migrating agencies should involve relevant third party support in discussions with SSCs regarding the business processes associated to the data files needed for migration.</p>	<p>Selected SSCs and migrating agencies should work together with financial management back-office support providers to ensure that accurate information is included in the Labor Cost File and time is allotted to review and test the file.</p>
	<p>Employee unique ID's were not generated in the selected SSC's system due to discrepancies in data standards between the migrating agency and selected SSC. The migrating agency did not complete all required data fields within its data tables.</p>	<p>Selected SSCs should provide guidance on how to complete required fields within data tables and develop a quality assurance process that enables both the migrating agency and their PMO staff to validate completion of the data tables prior to migration.</p>	<p>Data should be complete and cleansed in order to ensure that critical processes such as developing employee unique ID's and sending eOPF updates to OPM can be completed.</p>
	<p>The SSC's requirements for key data fields were not standardized across its data conversion templates, resulting in difficulties uploading data.</p>	<p>Selected SSCs should ensure that required data fields are standardized when migrating agencies are creating mock conversion templates.</p>	<p>Clarification and alignment of data field requirements allows migrating agencies to set up consistent mock conversion templates and devote less resources to manually uploading data.</p>

HRIT MIGRATIONS: CONSOLIDATED LESSONS LEARNED

Project Phase	Issue Detail	Suggested Resolution	Lesson Learned
<p style="text-align: center;">Post Implementation Evaluation</p>	<p>The migrating agency was required to assign additional resources to address discrepancies that accumulated from data mismatch reports.</p>	<p>Migrating agencies should identify common cases for mismatches and develop best practices, how-to guides, and standard operating procedures to reduce and mitigate the number of mismatches due to incorrect processing actions. Furthermore, selected SSCs should regularly meet with customer agencies to promote knowledge sharing and discuss how to reduce these occurrences.</p>	<p>Discrepancies from mismatch reports that are not resolved shortly after identification can accumulate and become a significant burden to reconcile.</p>

3.5 Data Conversion

Data Conversion refers to the process in which the data is transferred from the migrating agency’s legacy HRIT system or previous provider to the selected SSC’s system. The migrating agency and SSC IT project teams are responsible for performing data conversion activities and interpreting results to ensure data is accurately converted. Issues with this activity category may arise in any of the project phases, but are primarily concentrated in the Preparation & Analysis and Design & Development phases.

3.5.1 Data Conversion – Lessons Learned Overview

Agencies often experienced issues related to establishing network connections and completing data conversion activities on schedule. Agencies should purchase backup network connections and sufficient bandwidth to avoid connection issues. To facilitate effective data conversions, agencies should ensure that their selected SSC is familiar with the current structure of their data, while engaging with the SSC to thoroughly analyze errors and requirements.

SSCs encountered several issues related to Data Conversion activities. SSCs generally had difficulties aligning their data fields and structures with those of the agencies or their legacy providers. Engaging in a more detailed fit gap analysis of the agency data and SSCs’ data requirements would facilitate the completion of these activities.

3.5.2 Data Conversion – Lessons Learned Detail

Project Phase	Issue Detail	Suggested Resolution	Lesson Learned
Project Management	The shutdown process of the migrating agency’s legacy system unexpectedly extracted some data from the migration file, causing data errors in the selected SSC’s system.	Migrating agencies and selected SSCs should coordinate on a plan to shut down the legacy system that will not corrupt the conversion of data into the SSC’s system.	The process of sunsetting the migrating agency’s legacy systems has the potential to cause data conversion issues if it is not carefully coordinated with the SSC.
Preparation & Analysis	The selected SSC used an incorrect cost structure on time sheets for the migrating agency’s employees, creating reconciliation problems for the back-office support provider.	SSCs should coordinate with migrating agencies and their back-office support providers to ensure that correct data structures are being used during conversion.	Data structure issues are best addressed prior to conversion by all entities, rather than post-conversion.

HRIT MIGRATIONS: CONSOLIDATED LESSONS LEARNED

Project Phase	Issue Detail	Suggested Resolution	Lesson Learned
Preparation & Analysis	The migrating agency selected an SSC HRIT system prior to re-engineering its business processes, resulting in numerous gaps between agency-specific requirements and SSC capabilities.	Migrating agencies should complete a full fit gap analysis with all potential SSCs prior to selection that includes identifying their agency’s functional requirements and the various SSCs’ system capabilities to determine best fit. Migrating agencies can then assess which processes must be re-engineered to enable a successful migration.	Migrating agencies should review and update agency-specific business processes before selecting an SSC. The updated business processes should be standardized across the agency and be leveraged to select an SSC.
	The migrating agency lacked the capability to set up a Virtual Private Network (VPN) or a dedicated circuit to enable optimum utilization of the selected SSC's system.	Agency migration teams should validate connectivity capabilities before moving forward with the migration. Selected SSCs should provide system accessibility guidelines and discuss with migrating agencies’ HRIT points of contacts to ensure an effective data accessibility structure is in place prior to migration.	VPN connectivity enables agencies to effectively use the SSC systems and should be considered a required capability for migrations.
	Award actions were converted as the last personnel action for some of the migrating agency's employees, resulting in data conversion issues.	Selected SSCs and migrating agencies should identify all critical and necessary personnel actions to convert as part of the planning phase and include the necessary HR staff to begin preparing data for conversion.	Data conversion activities should be validated to ensure accuracy.

HRIT MIGRATIONS: CONSOLIDATED LESSONS LEARNED

Project Phase	Issue Detail	Suggested Resolution	Lesson Learned
<p>Design & Development</p>	<p>The migrating agency elected not to implement a backup connectivity source and experienced a major disruption in connectivity to the SSC shortly after go-live.</p>	<p>Migrating agencies should establish backup connectivity sources to mitigate disruptions in service from the SSC.</p>	<p>Migrating agencies should prepare for connectivity issues by implementing a primary and backup connectivity source.</p>
	<p>Differences in data processing procedures between the migrating agency's previous SSC and selected SSC caused inaccurate information to be converted into the selected SSC's system.</p>	<p>Selected SSCs should collaborate with previous providers to identify and cleanse inaccurate data.</p>	<p>Coordination between previous and selected SSCs can eliminate potential data inaccuracies caused by differences in the SSCs' business processes and data standards.</p>
<p>Design & Development</p>	<p>Sensitive agency information became available to all system users as a result of conversion to the selected SSC's system (e.g., appraisal ratings, disciplinary actions).</p>	<p>SSC system security and individual user access must be fully vetted by SSC system experts prior to go-live to ensure data security.</p>	<p>Migrating agencies can retain privacy for sensitive information by understanding and adjusting the selected SSC's system settings upon conversion.</p>
	<p>Due to unclear data conversion procedures, the migrating agency's HR staff was required to use a separate login ID for each of the agency's bureaus and could not be logged into multiple bureaus simultaneously, which inhibited their ability to process HR transactions.</p>	<p>The migrating agency and SSC should work together to ensure system access for HR staff uses a single sign-on access capability. Selected SSCs should develop clear guidance on conversion procedures and user access of SSC systems.</p>	<p>HR Staff may have unique single sign-on requirements for the selected SSC's system and should be addressed during planning for the migration.</p>
	<p>Limited data standards across the SSCs made it more difficult to complete the data transfer for the migration.</p>	<p>Data standards should be developed to decrease the cost and level of effort required to complete data transfers between SSCs.</p>	<p>Significant time and resources may be required to complete data transfers from one SSC to another until common data standards are adopted.</p>

HRIT MIGRATIONS: CONSOLIDATED LESSONS LEARNED

Project Phase	Issue Detail	Suggested Resolution	Lesson Learned
<p>Design & Development</p>	<p>Data for migrating agency employees who were separated from the migrating agency prior to the migration was not transferred to the selected SSC. This caused problems with the agency's downstream systems when the same employee was rehired after the migration.</p>	<p>Agencies should consider downstream system impacts of not converting previously separated employees.</p>	<p>Employees that are separated from the migrating agency and then re-hired may cause issues with downstream systems if their data is not migrated to the selected SSC.</p>
	<p>The migrating agency decided to purchase additional bandwidth for its network connection, which only resulted in minor cost increases and significantly improved system communications.</p>	<p>This is a best practice that should be followed.</p>	<p>Migrating agencies should select a network connection with sufficient bandwidth to enable effective system communications.</p>
	<p>The selected SSC assigned employee ID numbers that were already in use to some migrating agency employees.</p>	<p>The selected SSC should validate that previously used employee IDs are not reissued. Selected SSCs should consider establishing a unique identifier for each customer agency within their system and associate it when creating unique employee IDs.</p>	<p>Employee IDs should be unique and overlap of IDs must be corrected prior to conversion.</p>
<p>Implementation</p>	<p>Mock data conversions increased data quality and streamlined the data transmission process, increasing confidence in the go-live dataset.</p>	<p>This is a best practice that should be followed.</p>	<p>Mock data conversions facilitate the data cleansing processes and effectively prepare migrating agencies for the final data implementation.</p>

HRIT MIGRATIONS: CONSOLIDATED LESSONS LEARNED

Project Phase	Issue Detail	Suggested Resolution	Lesson Learned
Implementation	Due to differences in data field requirements, some information was incorrectly converted into the selected SSC's system.	Migrating agencies and selected SSCs should conduct a crosswalk of the legacy system and the SSC systems to analyze discrepancies between agency data and the SSC's system to align data field requirements and identify potential data manipulations that are necessary prior to conversion.	Data requirement analysis prior to conversion can help to prevent data conversion errors.
	The migrating agency and selected SSC did not conduct a comprehensive review of tax calculation discrepancies that were identified during data conversion.	Selected SSCs should involve the relevant staff within migrating agencies to review tax calculation discrepancies that are identified during data conversion activities.	To accurately reconcile the migrating agency's legacy data with the SSC system calculations, management reports should consider tax calculation discrepancies.
	Some bureaus within the migrating agency released the new HRIT systems to HR staff and managers prior to releasing it to employees.	All bureaus should release the new HRIT system to management and employees simultaneously to eliminate delays in fully implementing the system and maximize the use of resources for post-implementation support and training.	A bureau-level phased rollout of the new HRIT system may result in the inefficient use of migration project resources and prolonged delays of future rollouts to certain groups of employees within the migrating agency.

3.6 Testing

The Testing activity category is primarily composed of Parallel Testing and User Acceptance Testing (UAT), which are both processes used to ensure that the selected SSC system can perform all necessary functions agreed upon by the agency and SSC. UAT is completed by agency employees and all testing is analyzed by the agency PMO. Testing issues can arise in any phase; however planning for testing is typically included in the Project Management phase, while execution typically occurs in the Implementation phase.

3.6.1 Testing – Lessons Learned Overview

The Testing activity category primarily contains activities that require direct collaboration between the migrating agency and SSC. To receive the maximum benefit from Testing activities, agencies and their selected SSCs should conduct a comprehensive set of tests that assess the functionality of the SSCs’ systems and their alignment with agencies’ business processes and requirements in preparation for go-live.

Migrating agencies were often unable to dedicate the appropriate amount of resources to test certain functionalities of the SSC’s system, which led to errors during and after implementation. In some cases, SSCs did not consistently include all relevant stakeholders (e.g., back office support providers and accounting entities) in testing procedures. SSCs also encountered issues ensuring that security features are established prior to testing in order to reduce risk of delays. Agencies’ and SSCs’ commitment to fully engaging all relevant stakeholders and collaborating during testing can ensure that both parties analyze all potential sources of errors and develop solutions to mitigate risks.

3.6.2 Testing – Lessons Learned Detail

Project Phase	Issue Detail	Suggested Resolution	Lesson Learned
Project Management	The migrating agency had insufficient time during preliminary testing to determine business process changes that would occur upon go-live.	Migrating agency staff should have sufficient time in preliminary testing to develop and manage a list of business process changes in preparation for go-live.	The preliminary testing environment should be open long enough for migrating agencies to fully prepare for business process changes resulting from the migration.
	The practice of engaging the migrating agency and selected SSC in multiple agency-wide Parallel Tests helped facilitate a successful roll-out.	Conducting multiple agency-wide Parallel Tests is a best practice that should be followed.	Each migration should complete multiple agency-wide parallel tests.

HRIT MIGRATIONS: CONSOLIDATED LESSONS LEARNED

Project Phase	Issue Detail	Suggested Resolution	Lesson Learned
<p>Project Management</p>	<p>Payroll issues that were not identified prior to implementation were discovered by the migrating agency post-implementation.</p>	<p>Migrating agencies should ensure that all payroll data is adequately tested prior to go-live.</p>	<p>Data issues that are not tested prior to go-live are likely to cause issues post-implementation.</p>
	<p>UAT scripts provided by the selected SSC were not comprehensive enough for the migrating agency's users to test all relevant functionality within the selected SSC's HRIT system.</p>	<p>HR Specialists from migrating agencies should addend SSC test scripts in order to test the full functionality of the new HRIT system.</p>	<p>SSC-provided test scripts for UAT may not be sufficient for migrating agencies to ensure that all functionalities of the SSC's HRIT system can meet the agency's needs.</p>
	<p>There was insufficient time to complete full parallel testing for all of the IT systems, creating a significant risk to the overall success of the migration.</p>	<p>Full parallel testing should be completed for all of the IT systems in order to ensure that data input and conversion errors are resolved.</p>	<p>Full parallel testing is critical to ensuring the success of the migration and should be completed for all agency migrations.</p>
	<p>The migrating agency and selected SSC encountered connectivity and accessibility issues as a result of holding UAT at the agency site.</p>	<p>Migrating agencies should conduct UAT at the SSC site to eliminate connectivity and accessibility issues.</p>	<p>Hosting UAT at the selected SSC's location reduces the possibility of issues that could delay or reduce the effectiveness of the testing.</p>
<p>Preparation & Analysis</p>	<p>The migrating agency identified security issues during Parallel Testing.</p>	<p>SSCs should ensure that security settings are tested prior to Parallel Testing and that Security SMEs are utilized.</p>	<p>Security is an essential aspect of testing activities and should be made a high priority for migrations.</p>
<p>Implementation</p>	<p>Limited engagement from the migrating agency caused difficulties identifying errors and preparing management reports during Parallel Testing.</p>	<p>SSCs should collaborate with migrating agencies to ensure that a sufficient segment of the migrating agency's employees participate in Parallel Testing.</p>	<p>Sufficient participation from migrating agencies in Parallel Testing enables effective error identification.</p>

HRIT MIGRATIONS: CONSOLIDATED LESSONS LEARNED

Project Phase	Issue Detail	Suggested Resolution	Lesson Learned
Implementation	The back-office support provider was not included in Parallel Testing, resulting in difficulties processing the migrating agency's accounting reports.	SSCs should include migrating agencies' back-office support providers in Parallel Testing to ensure that they are able to continue providing services to the agency without interruption after go-live.	Selected SSCs should consider back-office support providers when conducting Parallel Testing.
	System performance and interface issues were identified post-implementation due to the lack of an agency-wide integrated end to end pilot test.	Migrating agencies and selected SSCs should engage in a full scale pilot that tests all systems and interfaces simultaneously over multiple pay periods.	A full agency-wide integrated pilot test can eliminate many issues that may otherwise only be discovered post-implementation.

3.7 Training

The Training activity category educates employees from the migrating agency on using the selected SSC’s system. The agency PMO plans and conducts training with some assistance from the SSC, which in most cases has experience in overseeing the training process from previous customer agency implementations. Training typically occurs during the Implementation phase, while the design and management of training is typically conducted during earlier segments of the Project Management phase.

3.7.1 Training – Lessons Learned Overview

Migrating agencies encountered several issues during Training activities involving their training programs’ scope, structure, and resource availability. To avoid these issues and improve the effectiveness of training programs, agencies should establish specific training objectives and outline the scope of skills in which employees are to be trained. While establishing training program plans, agencies should consider class size, timing, and schedule coordination with SSCs to ensure the correct resources are assigned to those programs.

SSCs also play an important role in development of training programs; however, several issues were identified regarding the content and depth of SSC designed training plans. For example, some agencies identified that “train the trainer” models used by SSCs may not provide sufficient training for new system users at the migrating agency. SSCs should collaborate with migrating agencies to fulfill training requirements and ensure that sufficient education is provided to agency employees in order for them to effectively transition to and operate the SSC’s system.

3.7.2 Training – Lessons Learned Detail

Project Phase	Issue Detail	Suggested Resolution	Lesson Learned
Project Management	Migrating agency employees continue to encounter issues using the selected SSC’s HRIT system as a result of the training program's lack of detail. The training program did not account for several components of processing personnel actions.	SSCs should prepare a robust and content-driven training model to address specific actions that employees will be required to perform.	Training programs that do not provide enough detailed education to migrating agency employees may limit employees’ ability to use the system.

HRIT MIGRATIONS: CONSOLIDATED LESSONS LEARNED

Project Phase	Issue Detail	Suggested Resolution	Lesson Learned
<p>Project Management</p>	<p>Comprehensive change management through e-trainings, webinars, and job aids enabled all agency employees to submit their time cards and be accurately paid in the first pay period after go-live.</p>	<p>Instituting a comprehensive change management program is a best practice that should be followed.</p>	<p>Effective change management and training for agency employees increases the effectiveness of the go-live process.</p>
	<p>The migrating agency did not provide sufficient training for critical HR and Payroll personnel.</p>	<p>The migrating agency should ensure that critical HR and Payroll personnel are provided with sufficient training to perform their responsibilities using the selected SSC's system.</p>	<p>Critical HR and Payroll personnel may require significant training on the selected SSC's system in order to effectively perform their roles and responsibilities.</p>
	<p>Agency bureaus underestimated or had difficulty obtaining the necessary resources for some aspects of the migration, especially training activities.</p>	<p>For a large scale IT implementation, each bureau needs a sufficiently staffed project team which is dedicated to migration activities and includes appropriate resources to provide training.</p>	<p>Dedicated and sufficiently staffed migration project teams are essential to ensuring that employees are appropriately trained and prepared to use the system.</p>
<p>Project Management / Implementation</p>	<p>Migrating agency employees had difficulty recalling system training because it was provided five months before the go-live.</p>	<p>Migrating agencies and SSCs should conduct system training just prior to go-live in order to ensure that employees can recall the training and utilize the system effectively.</p>	<p>System training should be conducted as close as possible to the go-live date.</p>
<p>Preparation & Analysis</p>	<p>Unauthorized data was accidentally presented by the trainer to training class attendees.</p>	<p>Training materials should be validated to ensure that they do not contain any unauthorized data.</p>	<p>Migrating agencies and SSCs should ensure that data is only shared with authorized users throughout the migration project.</p>

HRIT MIGRATIONS: CONSOLIDATED LESSONS LEARNED

Project Phase	Issue Detail	Suggested Resolution	Lesson Learned
Implementation	The selected SSC was unable to answer several policy and procedure inquiries while conducting training for the migrating agency.	Migrating agencies should include SMEs in training efforts to ensure that employees are provided with answers to specific policy and procedure questions.	SME involvement in training can ensure that all necessary information is conveyed to migrating agency employees.
	Registration limits for training classes were not properly managed, resulting in class sizes exceeding the recommended size.	Migrating agencies or the selected SSC should oversee a sign-up limit for each training class in order to regulate class size.	Class registration control that limits the size of each training class can enhance the training experience.
	Several key agency employees were removed during SSC training to attend a different mandatory internal training.	Migrating agencies and selected SSCs should coordinate training schedules to ensure that all key employees are able to attend the sessions.	Schedule coordination can eliminate absences and missed training material for the migrating agency's employees.
	Several of the migrating agency's bureaus implemented a robust training plan that spanned the entirety of the implementation.	This is a best practice that should be followed in all bureaus.	HRIT system training should be comprehensive and provided to each bureau in a migrating agency.
	The "train the trainer" model, in which the selected SSC trains migrating agency instructors to train other agency employees, was not sufficient for the migrating agency to effectively implement the selected SSC's system.	Migrating agencies and selected SSCs should collaborate to devise a training plan that is comprehensive and includes additional training from the SSC.	Training should be conducted by HRIT system experts rather than agency HR staff that were trained by the SSC via the "train the trainer" model.

3.8 Post-Implementation Support

Post-Implementation Support activities are performed by the SSCs to provide help to the agency leadership and employees following the completion of the migration. In addition, agency leadership provides support to their employees with the SSC system, such as help desk and IT expertise. SSC and agency SMEs run help desks to assist with the use of the SSC’s system post go-live. All support activities are performed in the Post-Implementation Evaluation phase of the migration project.

3.8.1 Post-Implementation Support – Lessons Learned Overview

After the migration go-live, multiple issues were encountered in regards to the SSCs’ Post-Implementation Support activities. Migrating agencies did not have access to a SSC-hosted help desk and on-site SSC support staff did not receive sufficient assistance. SSCs should ensure that support resources are present at the agency, resources remain for the length of time that is agreed upon by the migrating agency and SSC, and agencies are given all of the SSC help desk contact information

In addition, agencies identified problems due to a lack of internal agency dedicated resources to support bureaus and agency employees after go-live. Agencies are responsible for communicating with the SSCs to ensure mutual understanding of the level of SSC support after go-live.

3.8.2 Post-Implementation Support – Lessons Learned Detail

Project Phase	Issue Detail	Suggested Resolution	Lesson Learned
Post-Implementation Evaluation	The migrating agency and selected SSC collaborated to provide a support center at the agency site post go-live.	This is a best practice that should be followed.	The support center model where SSC and agency resources are co-located at the agency after go-live streamlines the issue escalation process and decreases issue resolution time.
	Migrating agency employees have had difficulty obtaining accurate and comprehensive assistance from the selected SSC's help desk.	Migrating agencies should establish POCs to participate in weekly post-implementation meetings with the selected SSC to report issues identified by employees.	POCs from migrating agencies are responsible for relaying service expectations and potential issues to the selected SSC's PMO.

HRIT MIGRATIONS: CONSOLIDATED LESSONS LEARNED

Project Phase	Issue Detail	Suggested Resolution	Lesson Learned
<p style="text-align: center;">Post-Implementation Evaluation</p>	<p>The migrating agency lacked extended on-site support from the selected SSC after the first full week post go-live.</p>	<p>Selected SSCs should consider providing dedicated support at the migrating agency’s site post go-live and engage in follow-up meetings with the agency PMO.</p>	<p>Migrating agencies may require support from selected SSCs for an extended period of time post go-live to effectively transition to the SSC’s HRIT system.</p>
	<p>Bureaus within the migrating agency that assigned dedicated help desk personnel were more prepared for the transition to the selected SSC's HRIT system.</p>	<p>Establishing dedicated help desk resources at the bureau level is a best practice that should be followed.</p>	<p>Ongoing, committed help desk support at each bureau facilitates the go-live transition.</p>
	<p>The migrating agency leveraged additional internal resources to ensure sufficient resources were available for testing of post-implementation HRIT system releases.</p>	<p>Assigning resources to test post-implementation system releases is a best practice that should be followed.</p>	<p>Migrating agencies may require additional resources post-implementation to test system updates.</p>

4 Conclusion

Based on the lessons learned collected by the HR LOB from migrating agencies and SSCs, this report documents several major themes regarding the challenges and lessons learned experienced during federal migrations to core HR and payroll shared services. The establishment of an integrated project plan and subsequent collaboration between the migrating agency and SSC may mitigate many of these challenges and risks throughout the migration project. Although communication comprises its own activity category for migrations, it is also a critical component of every project phase and activity category. Communication between the migrating agency and its selected SSC increases collaboration and productivity, and assists in the resolution of unexpected issues that arise during migrations. Finally, effective and comprehensive testing of agencies' data conversion and processes for transitioning to new HRIT systems can help to identify potential issues and aid in the development of preventative solutions.