

Bromcom MIS implementation: best practice guide

Introduction

This document outlines the key factors to consider when planning for and managing your Bromcom MIS implementation. It is based on best practice in systems implementation and many years' experience implementing Bromcom in schools.

It covers:

1. Project management and planning
2. Change management and training
3. Technical deployment, including data migration
4. Post go-live support
5. Full checklist for managing a Bromcom MIS implementation

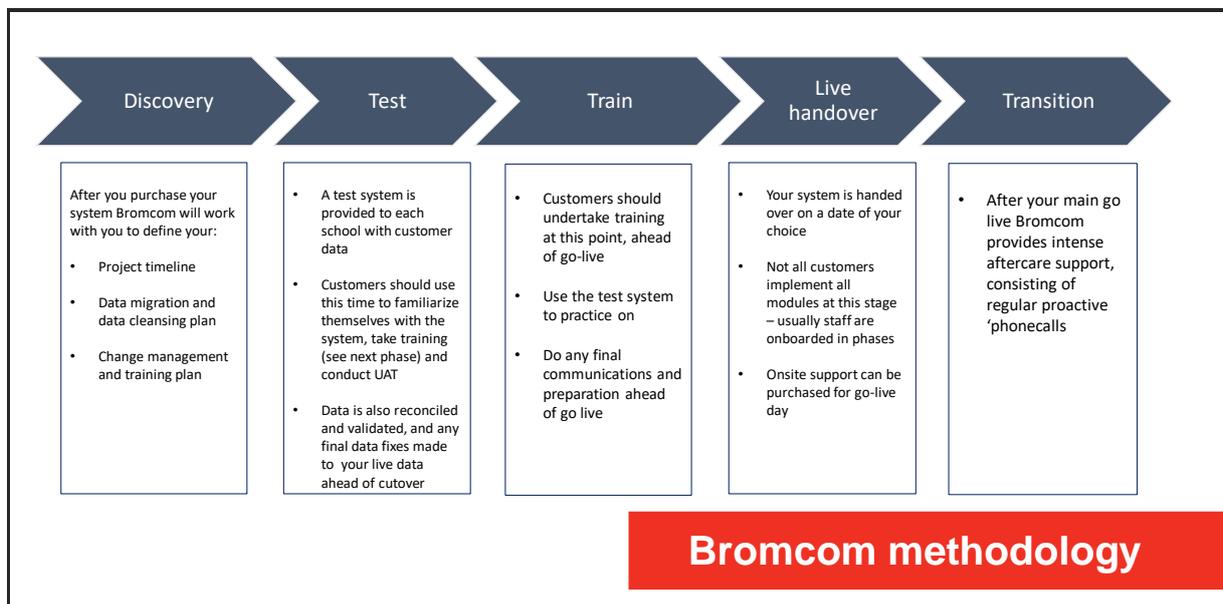
In addition, we have a wide network of schools and MATs who have successfully made the transition to Bromcom and we are more than happy to provide you with contacts to discuss the best approach.

1. Project management and planning

Bromcom's implementation methodology is based on best practice and outlined in the diagram below. Your Bromcom deployment manager will talk you through this as part of your discovery.

Please note: only secondary schools get a test migration. Primary schools get a training system.

Bromcom implementation framework



You will also be provided with a number of guides to read, starting with this one. Read all this guidance and follow the relevant recommended steps to help ensure that your implementation is a success.

Scope of go live and phased adoption

It is best practice to stagger your Bromcom implementation to reduce risk and reduce the amount of training that staff need to do upfront. Bromcom comprises multiple modules and it is likely you don't need to use all of these from day one.

Create a roadmap for a phased implementation and from that determine a change management plan which includes staff training and communications at the right time (i.e. not too long before they go live with the module) and any other changes such as changes to school policies or procedures. Please see section two, 'change management and training.'

Cutover and go-live

Bromcom will agree a go-live date with you that fits with your timelines. Ensure you read the dates in your Bromcom deployment project plan and communicate the final cut-off date for using your current MIS to relevant stakeholders as early as possible.

You'll also need to agree what you will do with your current MIS and any redundant applications once Bromcom has been implemented to ensure people do not keep using these applications – for example, removing staff logins.

Project team

Bromcom will appoint a deployment manager to manage the technical implementation and data migration. Schools/Trusts should appoint an individual with the requisite skills and authority to handle the day-to-day implementation and also a senior sponsor to ensure the project is successful. Effective senior sponsorship is a critical success factor for any change project like this.

Project reporting, governance and controls

Formulate a plan for how you will keep stakeholders informed about the project, focussing on the key milestones where they need to take **action** and attend **training**.

Decide how you will govern the project – bigger projects may need a project board, but single schools may find this enough to cover at their regular SLT meetings.



2. Change management and training

Technical architecture, including interfaces.

Ensure you understand the current applications and data in use, and how this will change when you move to Bromcom. Identify the interfaces between your MIS and your other systems and formulate a plan for replacing these (if needed) when you move to Bromcom. Replicating interfaces is usually straightforward and your supplier will do this for you, but you should make them aware of your go live date *well in advance*. Usually they will configure the interface on your live system once it has been handed over, but some will configure this on your test system for you to test.

Please refer to the [Bromcom website](#) for a list of applications we interface with.

Training

A comprehensive and high-quality training programme is the single most effective way to guarantee a smooth go live.

Identify who needs training early on in the implementation, using the information on the Bromcom training website and in particular, the individual training agendas.

<https://docs.bromcom.com/training/book-training/>

- **Go live training:** the initial 'basics' training courses
- **Move forward training:** role-specific or more in depth sessions

Both go live and move forward training must be taken before go live.

Ensure these staff book their training sessions as early as possible and make sure that they inform you that they have booked in.

All training sessions are recorded and sent to attendees after the session, but do not rely on staff watching recordings – ensure that staff have sufficient time to focus on the live training in real time

Use the training (or for secondaries, test) system with your own data to practice running processes in the system - this a great way for staff to get familiar with the product..

Reports

Reporting is one of the most important functions of an MIS. Make a note of any reports that you rely on in your current MIS and want re-created in Bromcom. Make sure you attend the Reporting training course to ensure that these can be replicated in Bromcom. Not all will be needed for go-live so agree which are needed immediately and which can be created later on.

Communication plan



Internal and external communication will be critical to minimise confusion during the project and ensure everyone knows what is happening and why (the benefits!).

Agree who is responsible for this communication and how best to communicate with staff.

Bromcom has a range of helpful videos and guides on our [Help Centre](#) for non-core users: teachers, parents and students.

3. Technical deployment and data migration

Provisioning Bromcom – for your IT department

Bromcom is a web-based system accessible via any web browser and on any device.

You may need to make some minor changes to your IT policies to optimise system performance. You'll also want to ensure you have access to goto webinar for training, and the Bromcom URL's. Please read the internet explorer guidance and whitelisting guidance available on the [Help Centre](#).

Data migration

Data Migration Scope

Read the relevant Data Migration Scope documents on the [Help Centre](#) and ensure you understand which data will be included in the migration and which will not.

Bromcom data migration is for your MIS and does not include any 'bolt-on' applications (most of which do not store data). Where additional data, information or documents do need to be migrated into Bromcom, you can often use Bromcom's import facilities outlined in your training sessions, or purchase additional data migration support. If you decide to import documents into Bromcom you may need third party software to export them from SIMS, so please talk to your Bromcom deployment manager and read [this guide](#).

Decide what you will do with any data that is not included in the scope of data migration. Generally, archiving should be sufficient as any data you need to operate Bromcom day-to-day will already be included in the scope of the data migration. Create an archive plan that provides secure access to the residual data items for the period required.

Data migration process and checking

Bromcom will provide a secure facility for you to transfer your data, if we are migrating at the database level, or provide instructions on how we are retrieving the data via API. You should not email your data to Bromcom or anyone else.



Agree who will have responsibility for transferring the data and let your Bromcom project manager know.

Once you have a test system it is your responsibility to check the data as part of your UAT process to ensure you're happy with it. You can report any issues to migration@bromcom.com.

User acceptance testing (UAT)

Bromcom provides a training or test system for you to train and conduct UAT on. Although you do not need to conduct UAT as Bromcom is "off the shelf", a UAT process can be helpful for familiarising users with the system.

Security, including roles and permissions

Access management

Agree your identity and access management policy – will you be implementing single sign on (SSO)? If so, decide when you will implement this and test it before deploying it to users. Read the [Single Sign On Guide](#).

Remember that if you implement SSO in your test system as this will need to be replaced for your live system.

Roles and permissions

Understand the roles and permissions in the Bromcom MIS and agree who needs which role. Bromcom will provide a single administrator login credentials to a nominated individual, who will then be responsible for provisioning your roles for the wider user base. As part of the migration all users are provisioned a basic (teacher) role.

Final set up and configuration before go live

Please use the Bromcom [go live checklist](#) for a list of the main tasks required after the live system is handed to the school, ahead of your first go live day.

4. Post go-live support

Helpdesk support



Agree who will be responsible for raising calls with the Bromcom helpdesk and make sure you use [the online form](#) to get these added to the system.

Familiarise yourself with the Support Desk contact channels and opening times and communicate these to the relevant stakeholders.

Transition Support

Once live, those customers who have purchased support from Bromcom will receive 1-2-1 support from a Customer Success Manager. This consists of regular phonecalls/email/onsite support that starts on day one of your go live and continues until you're happy and confident using the MIS. Make sure that you are happy with the time that the first phonecall is booked for, have arranged for the correct person to attend the first transition call.

Additional training requirements

If you are implementing Bromcom modules in phases remember to complete your extra training before you start using the additional modules. If you are not sure, discuss with your Customer Success Manager.

System maintenance and releases

Bromcom releases new enhancements, features and products regularly which provides customers with a range of benefits. However, this does require a shift in mindset for customers who are not used to this. To ensure that you maximise the benefits of these new features, agree who will be responsible for keeping abreast of the changes and communicating these to your users, and arranging any follow up training or guidance.

It is also best practice for a senior sponsor to maintain responsibility for the system and ensuring staff continue to realise the benefits of the system.

5. Full checklist for managing your Bromcom MIS implementation

Aim to work through the below checklist which summarises the implementation advice outlined in this document.



Table 1: implementation checklist

| Area | Function | Responsibility | | Checklist for customers |
|---|--|----------------|-------------|--|
| | | Brom-com | School /MAT | |
| Overall project management and planning | Project management | | X | Have you read this guide and the other guidance referenced within it to understand the activity required? |
| | Adoption roadmap | | X | Have you agreed when you will adopt each module in your school? Consider staggering implementation |
| | Cutover and go live | X | X | Have you agreed an initial go-live date with Bromcom that fits with your school's workload and timetable? Are you happy with the plan that Bromcom has communicated in the deployment project plan? |
| | Project team | X | X | Have you appointed a team – both a senior sponsor and an individual with the requisite skills and authority to handle the day-to-day implementation? |
| | Project reporting, governance and controls | | X | Do you have a plan for governing the project with sufficient oversight of risks and issues, and a suitable escalation point internally? |
| Change management and training | Technical change management | | X | Have you identified your current applications and data and how this will change when you move to Bromcom? Have you formulated a plan for replacing these when you move to Bromcom? Please refer to the Bromcom website for a list of applications we interface with - if yours is not included please discuss with your deployment manager |
| | Other change management | | X | Do you understand which business processes are changing and any school policies or procedures that need to be updated? |
| | Custom reports | | X | Have you identified the custom reports that you want re-created in Bromcom |



| Area | Function | Responsibility | | Checklist for customers |
|--|-------------------------------------|----------------|-------------|--|
| | | Brom-com | School /MAT | |
| | | | | and agreed which are needed for go live? Have you agreed a plan for training your staff to recreate these reports? |
| | Training | X | X | Have you identified who needs training and agreed how they will be trained? Have you booked your Bromcom-led training sessions to take place ahead of going live? Have you booked any “train the trainer sessions” for other staff? Have you visited and book marked the online help centre for free training materials and videos? Have your staff practiced using the system ahead of go live, for example as part of UAT? |
| | Communication Plan | | X | Have you identified all affected parties and agreed who and how you will communicate the changes? Think about the different users – suppliers, teachers, parents, etc |
| Technical deployment, incl. data migration | Provision and configure environment | X | X | Have you read the key documents to optimise system performance? Please read the relevant setup guides |
| | Data migration | X | X | Have you read and understood the Data Migration Scope documents and created an archive or migration plan for any data, information and documents that will not be migrated across to Bromcom? Have you agreed who will have responsibility for passing Bromcom your data and receiving the logins? Do you have a data reconciliation and sign off plan? |
| | User acceptance testing (UAT) | | X | Do you have a UAT plan which outlines the key processes you will run through when you receive your test and your live |



| Area | Function | Responsibility | | Checklist for customers |
|---------------------|---------------------------------|----------------|-------------|---|
| | | Brom-com | School /MAT | |
| | | | | system? |
| | Security, including roles | | X | What is your identity and access management policy – will you be implementing single sign on? Read SSO guide . Have you mapped out the roles your users need? Have you agreed who will allocate these? |
| | Interface testing | | X | Do you have a plan for testing your replacement interfaces? |
| | Go live – final setup | | X | Have you identified who will be responsible for final setup before go live, including user provisioning? Have you created a checklist for setting up the system, using the Bromcom go-live checklist? |
| Post implementation | Transition support | X | | Have you agreed who will attend the first transition call with your Customer Success Manager and let your deployment manager know? |
| | Access to Helpdesk | X | | Have you agreed the person who will be responsible for raising calls with the Bromcom helpdesk? Have you added them to support, following this guide? |
| | System maintenance and releases | X | X | Have you identified who will be responsible for keeping abreast of system changes? |

