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The “Discovery Phase:” Guidance and Considerations for Beginning a System Implementation

A few key points when entering a Discovery Phase

For:
Clients and Friends of Riparian, LLC

Implementing a new system can be a daunting task filled with complex and nuanced challenges. Starting off with the right “Discovery Phase” or “Pre-Assessment” project is a great way to mitigate some of the risks associated with those challenges by ensuring an advancement on the full suite of requirements, program planning deliverables (including scheduling, costing, and resource requirements), and key gap documentation. Below are some tips and considerations when preparing for a Discovery Phase.

1.1 Good Requirements Make Everything Easier

The importance of successfully gathering complete and well-defined requirements for a system implementation is hard to overstate. Robust requirements empower businesses to confidently choose the right solution(s) (which have long-term partnership implications), pave the path for smooth design and build phases (minimizing rework/surprises), and become the single greatest predictor of system test quality and post-project audit risk.

Most system integrators understand good requirements must be clear and testable but often lack awareness of other enhancements such as ensuring each requirement is independent and self-contained, yet work together to define the future state. Common issues include supplementing poor requirements with narrow examples, limiting to sample lists of values, and creating lengthy comment fields. These examples point to incomplete requirements that are most likely only fully understood by their author, and invites misinterpretation by developers, testers, new hires, and even external auditors. A good system integrator helps clients document better requirements at both the individual and aggregate levels to minimize major project risks without relying on further, undocumented clarifications.

1.2 See the Full Picture

Gathering system requirements must be timely, effective, and collaborative otherwise projects can be plagued with rework and delays - choosing the right integrator to lead these efforts is a critical decision. Many system integrators will know the solution system well, and understand standard project deliverables, but rarely have the experience to identify the full depth of requirements that are inherent to the pharmaceutical industry. Too often we see integrators limiting requirement gathering discussions to only the system's functionality due to industry/SME knowledge gaps. System integrators with extensive pharmaceutical industry expertise will not only cover the system functionality, but provide valuable insights regarding high-risk business matters (e.g. unclear legislative guidance), inefficiencies/best practice opportunities, and future audit expectations of business processes.

1.3 Watch for Rabbit Holes

There are numerous ways a Discovery Phase can be delayed or even cause future project setbacks. One common factor can be solutioning too soon. While it is in our nature to design a solution when presented with future problems, trying to deep-dive during the initial Discovery Phase at the detriment of the entire project can be costly. Discovery Phases are typically compressed in schedule, and it is important to balance gathering enough information to make informed planning decisions without duplicating the planned Design Phase. Good system integrators will have a better sense of the appropriate level of detail necessary when discussing gaps or possible design solutions. They will keep the project moving by addressing complex gaps in ways that avoid project delays, creating time for other high-priority topics, and progressing to further phases of the SDLC.

1.4 Consider Future System Needs

Change is a constant and we encourage our clients to carefully consider and prepare for all future variables to the extent possible when selecting and developing their

solution systems. Common topics include new products (e.g. drug acquisitions), new strategies (e.g. authorized generics, bundles, etc.), new contracts or programs (e.g. government and/or commercial), and scalability of manual processes (e.g. external GP calculations). We would encourage clients to ask their integrators about expected legislative changes and industry trends, and to consider finding a partner that can be used throughout the project - and in the future - as a trusted resource.

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