PeopleSoft Selective Adoption

Planning and Implementing a Successful Strategy

What is Selective Adoption?

With version 9.2, PeopleSoft has changed the way maintenance, enhancements and new features are delivered and applied. Customers choose the changes they want—on their schedule—while retaining strategic customizations. New enhancements are made available immediately so customers do not have to wait for the next release and go through an expensive upgrade to improve the value of their applications.

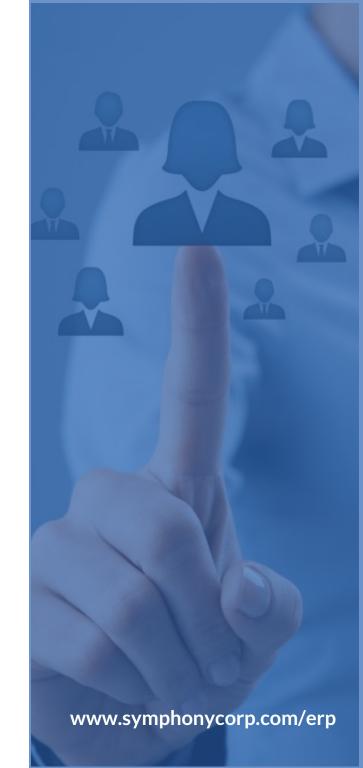> Clients that have upgraded to PeopleSoft 9.2 report time savings of 35% to 50% in the update and upgrade process.

- Michael Guay, Gartner

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As an organization on PeopleSoft 9.2, "Selective Adoption" means:

- You get new capabilities without the need to implement a major upgrade ever again.
- You take only the changes you want, when you want.
- You don't need to be current on maintenance to take changes.
- Do all this while retaining strategic customizations.
- You are able to proactively manage application growth and utilization.

What's the real benefit?

Selective Adoption has been around for several years now and organizations that have upgraded to 9.2 and have implemented effective Selective Adoption strategies are experiencing significant benefits, saving time and money and customizations are down.

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Defining a selective adoption strategy

When we talk about defining a strategy, we mean setting your organization's approach for Selective Adoption – one that is in line with a model of continuous improvement and delivery. With that, there are a few steps you can take to define that strategy.

- Change the organizational mindset.
- Develop a schedule that works best for your organization and fits the new Selective Adoption model.
- Plan your Selective Adoption budget.
- Plan for taking on new features.

Change the organizational mindset

For an organization to take full advantage of the Selective Adoption delivery model, it must be proactive and ready to adopt change.

This is a new concept; with new concepts come new mindsets. Remember we are now living in a world without upgrades, and that means your system is more agile.

It's important for those developing this new strategy to understand there isn't a "right" or "wrong" approach to Selective Adoption. The only "wrong" is to have NO approach at all. What may work for one organization may not work for another – even those with a similar technology footprint.

Develop a schedule

Each organization should plan a schedule for continuous delivery that works best for them. You may want to stagger updates to occur at different times or perform them all at once.

A suggested scheduling approach:

- Start by developing a plan to get current to the most recent 9.2 image, if you aren't already.
- When they are released, immediately apply critical (P1) tax, regulatory, and security updates using the latest update image.
- Regularly apply scheduled, low-cost, high impact features and fixes. These are small, targeted efforts that require little development time and have a low impact on users.
- Every 6 to 12 months, make sure to have your products updated to the current maintenance levels and take advantage of all the latest features. When your products are up-to-date, applications run better and future features and maintenance are easier to apply.

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Plan a budget

It is important to plan a budget so that your Selective Adoption project has the necessary resources needed to make it successful. Doing so will also help demonstrate the value of planning and implementing the SA strategy.

> " The key to a successful upgrade is a good plan: Avoid a technology-only upgrade strategy. This can be avoided with early planning that involves the business community. Behind every successful upgrade is a good upgrade plan. "
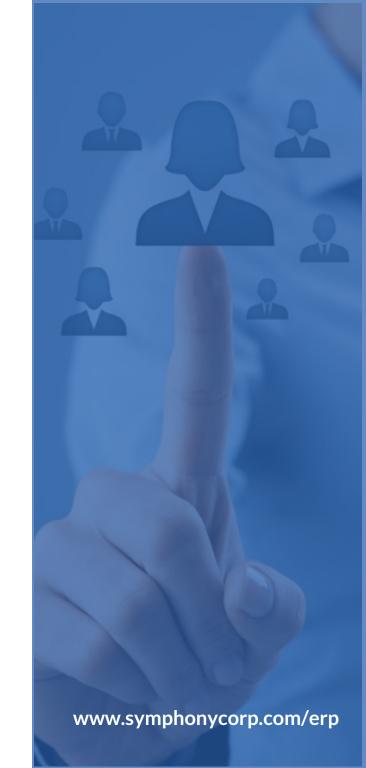
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Develop a plan for taking on new features

Selective Adoption allows you to decide which updates and features to implement and when. It is crucial to think through your priorities and strategy for this form of continuous improvement, and to develop a plan to reduce customizations. Make sure to invite all appropriate business (including executive leadership), IT staff, along with your Selective Adoption Partner to the table when this collaborative plan is developed.

Develop a plan for testing

Given the increased frequency of testing, it would be advantageous for organizations to develop an automated testing capability, if one does not exist already. Ideally partnering with a Selective Adoption expert who can help you leverage the power of PeopleSoft Testing Framework (PTF).

Measure and assess your progress

Since the Selective Adoption model is one of continuous improvement there is a heightened need to frequently check on system performance and assess maintenance issues.

- Ensure maintenance strategies make sense and make adjustments as necessary.
- Assess the testing schedule and make adjustments if necessary.
- Make sure to continuously assess new features and adopt them as needed.
- Make sure new features are utilized and users are continuously informed about new features and functionality.
- Keep an open line of communication between technical and business users, and your Selective Adoption Partner, as this will ensure you are able to continuously measure and assess progress.

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Stay informed and up-to-date

Gone are the days of waiting years for new upgrades and features. Make sure to stay connected with and consult your Selective Adoption Partner, who will help you keep business leaders and IT up-to-date on new features and functionality.

You and your Selective Adoption Partner should stay plugged into the resources from Oracle, relevant user groups, and the user community in general. It's important to review the image update document each time an update image is released.

Oracle has some great resources about Selective Adoption on their PeopleSoft Information Portal.

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Symphony's PeopleSoft Selective Adoption Services

With a network of one of the largest pools of PeopleSoft talent, Symphony leverages its best practices, 24/7 global delivery model and proven frameworks to bring transparency, predictability, and cost savings to every implementation, upgrade and ERP managed service project. Symphony's Selective Adoption services allow for both on-premise and off-premise management with a focus on:

- Staying current
- Planning
- Update strategies
- Implementation

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Symphony leads organizations through a series of critical steps, guided by industry best practices, to prepare them for an ERP upgrade that is not merely an IT project, but also a business transformation process.

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