

QUALITY STATEMENTS

QUALITY ASSURANCE

We take the issue of quality very seriously across all disciplines within Castleton Technology. All projects are run in line with our own Quality Project methodology which uses the most relevant parts of Prince2 and ITIL. Our solutions are usually implemented in a matter of weeks so full-blown Prince2 plans are never required. However controls exist throughout all the stages of the agreed implementation plan and these are monitored regularly.

Castleton Technology is in the throes of preparing for certification for ISO9001 and expects this to be in place very shortly. In terms of customer service, Castleton Technology is ranked very highly with its customers as has been proven in our recent annual customer Satisfaction Survey.

Castleton Technology is recognised as a supplier with whom housing associations can work in partnership and have significant influence over future developments and enhancements.

Once a project is 'live' and has been running for three months, the client is passed from the Implementation Team to the Account Management Team, whose role it is to maintain long term dialogue with the customer and to ensure they continue to get maximum benefits from the operation of Castleton Technology's systems.

They will of course keep the client fully informed of new developments and market issues, but are primarily targeted at ensuring long-term customer satisfaction.

PROJECT MANAGEMENT

Project management services are available to guide users through the implementation of a new system. The project manager would identify tasks and risks, plan required activities, identify the contingencies, and co-ordinate resources with a view to meeting the required project deadlines. The implementation of a new computer system requires joint effort from both Castleton Technology and its new customer.

There are responsibilities for both parties to ensure that the project receives the commitment and resources required to achieve a successful implementation.

The implementation of the Castleton Technology EDRM system is very simple compared with implementing a complete housing management system. It should take a matter of weeks rather than years! The process of implementation through to system testing and roll out relies on a number of key steps including:

1. Project Kick-Off meeting to confirm dates and milestones
2. Core system installation
3. Process rules scoping session with designated housing & finance team members
4. Deployment of completed process
5. User training (test users)
6. Acceptance testing
7. Post test process review meeting
8. User practice and review
9. Final process amendments
10. User training – train the trainer
11. Deployment of live process
12. Review meeting - post live running

A draft implementation is enclosed overleaf summarising the key activities and time scales.

PROJECT MANAGER

The Castleton Technology project manager is a senior member of staff, experienced in consultancy, implementation, project management, and provides the customer with a single point of reference when dealing with any implementation problems or queries. The project manager co-ordinates regular review meetings, reports on the progress of the project, brings to the attention of the project team any issues that may have an effect on the overall project delivery and, where necessary, advises the team of any necessary corrective action.

The project manager maintains a project plan, detailing the implementation activities, a project risk assessment, and a record of all staff time spent on site.

All consultancy and training visits to the customer site are recorded in the form of visit notes, action records and training evaluation reports. These documents provide formal feedback to the Castleton Technology project manager on the work undertaken, and on any issues which have arisen during consultancy and training.

It is the responsibility of the project manager to take any remedial action if there is slippage on the project, to advise the customer of risk factors during the implementation, and to maintain billing records for budget purposes. A project highlight report at the end of each fortnight would be produced. The report covers the following areas:

- Progress made during the current review period;
- Planned activities to be performed during the following review period;
- Any potential issues that have occurred or likely to occur on the project since the last review period.

It is important to note, that any project issues (change requests) raised during the review period would initiate the change control process. The project highlight report will be submitted at project review meetings and forwarded to the project sponsors.

It would be the responsibility of Castleton Technology's project manager to review the plan on a regular basis and add details about percentage complete, actual effort, issues and comments.

Castleton Technology recommends that the customer also selects a project team, which would normally consist of a project leader with responsibility for implementing the individual systems, and a project sponsor. In some instances, the latter roles of project leader and sponsor might be combined in one and the same person. The customer's project leader should report to a senior officer with budget and decision making powers for the project. The background of the project leader will vary dependant on availability but our experience indicates that a desire to succeed is more important than any specific knowledge of IT or housing.

We would identify the role of project leader as co-ordinating the day-to-day implementation activities within the housing organisation to ensure that the resources are brought to bear to achieve the timescale.

The project sponsor would have an overall view of the project, and might be involved occasionally in resolving any internal conflicts over the priority of modules, or the resourcing of the project.

It is our view that the responsibility for implementing the system is joint between Castleton Technology and the customer, as both must contribute time and effort to secure a satisfactory implementation.

PROJECT MANAGEMENT SERVICES

As soon as a project manager is appointed to a project, a variety of standard events and tasks are immediately commenced. These would be covered in some detail in our project plan however the main events and these tasks are covered below.

Sales Handover

The main aim of the handover session is to enable the project manager to gain a full and clear understanding of the new project and to check that all necessary preliminaries to the commencement of a project have been agreed. The meeting is attended by all relevant Castleton Technology staff. Even at this early stage, the first ISO 9001 quality procedures come into play which ensure that certain aspects of the implementation have occurred, are recorded, and the next actions planned and agreed.

Project set up

The project manager then progresses the set up and creation of the new project following strict quality procedures. The project is created on our internal computer systems and standard binders and documentation are produced. This stage also includes the initial draft of a standard project plan tailored to match the anticipated requirements of the customer.

Kick-off meeting

As soon as possible after the handover session, the kick-off meeting would be arranged. This would be attended by the Castleton Technology Project Manager and all customer representatives who would play a major role, including IT.

The aim of this meeting is to agree business formalities and discuss the planning of all the stages of the project including methods, procedures, training etc.

Also, it is necessary to ensure that the scope of the project has not changed in any way since the issue of any requirements Specification, before formalising the next steps to take.

Installation & Systems Testing

When installation has been completed on site, technical services would fully test the installation including printing on the printer to be used initially during training. They would also set up test users and access rights on the system so that training can commence.

IBS will deliver an initial demonstration system and assist the organisation in the development of Test Plans. A joint plan will be required to cover all aspects of testing including Interfaces, Customisation, and Performance Testing. This would be scheduled in line with the above plan.

Detailed Project Planning

Immediately after initial set up requirements and after the scope of the project has been clearly defined and agreed, the project manager would produce a detailed project plan. The project manager would produce summary plans that can be easily used to view the overall life span of the project and detailed plans covering every individual project task, tied to the resource names as agreed at the kick-off meeting.

The project manager would now be considering the training and any data conversion and/or back-scanning requirements to be arranged and would be booking dates on the plan for the staff already appointed to work on the project. All these details would be incorporated into the plan in preparation for its formal agreement. The document as agreed would then form the primary project management tool that would be constantly reviewed and used to drive the project through to completion.

Business Process Review Meetings

The prerequisite to commencement is to hold a business review meeting whereby the module leader would raise areas where decisions need to be made by the customer on systems references and codes, the way in which parameters would need to be set up to replicate or replace existing policies. This is especially important where workflow is to be introduced.

Every meeting held at a Castleton Technology office or on site has to follow agreed quality procedures. Formal minutes would be produced as normal, however, a specification record with target dates and responsibilities would be produced to ensure that progress is driven with vigour.

Project Meetings

After the initial business review meeting, normal project meetings would take place on an agreed but regular basis. These meetings need to take place without fail or the project might not be a success. These meetings would focus on the project plan and the tasks identified as being pertinent at the time of the meeting. It is also very important to maintain regular face to face contact between all parties involved in the implementation process.

Hardware and Software

Dependent upon the scope of the contract, following the sales handover, the project manager would arrange a final requirements analysis with the Castleton Technology Technical Services Manager in order to progress the early ordering of all equipment. This would ensure that delivery lead times are kept to a minimum. At the same time, resources would be provisionally scheduled for machine build, software loading, installation on site etc.

Testing Strategy

The project manager would stress the importance of efficient and effective testing of all system processes. This would include direct IT system set ups, functions, procedures, data integrity following conversions, interfacing etc. A testing document would be provided which assists in the thought processes and actions that the customer needs to ensure take place. However, the customer must take ownership of this key activity.

Final Systems Acceptance

Testing and acceptance occurs throughout the project at relevant stages. However, it is also essential that formal acceptance and satisfaction of the whole project be taken before the closedown of the project takes place. This would normally happen at the final project meeting.

SPECIFIC CUSTOMER RESOURCES

The customer's staff would be involved in the following areas of the Implementation:

- Project Management
- Resource Management
- Initial Implementation Planning
- Conversion Specification and Testing
- Interface Specification and Testing
- Document Customisation Specification & Testing
- Hardware & Software Operation
- Access, Security & Audit Trails
- Network Management
- Backup & Restore
- Batch Processes scheduling, JCL etc.
- Housekeeping
- Conversion & Back-scanning
- Possible User Training
- System Operation & Management

TASKS RESPONSIBILITY

	Castleton	Customer
Module Training (train the trainer)	Y	-
End user training	-	Y
Data transfer and conversion	Y	Y
Specification of interfaces	Y	Y
Development of interfaces	Y	-
Testing of interfaces	Y	Y
Acceptance testing	-	Y
Provision of training room	-	Y
Document customisation	-	Y
Coding structures	Y	Y
System testing	Y	Y

Please note that although we expect involvement from the customer's staff in the above areas, we are not suggesting that these activities are left for the customer's staff to sort out amongst themselves!

We are simply highlighting where the customer would become involved in the total project. Throughout the implementation period Castleton would have staff on site to assist the customer staff achieve the agreed deadlines.

STAFF TRAINING

Castleton Technology offers the facility to train in two ways viz. 'train the trainer' whereby we would train key customer representatives who in turn would relay the training to their own end users, or alternatively, we could train all the end users directly.

Specific training days are standard for each module or part of the system. Each specific batch of training commences with parameter setups i.e. making the software match the policies and practices of a particular organisation.

The training would allow for up to eight of the customer's staff to be trained simultaneously, and these staff would train the end user staff to an agreed schedule.

This arrangement has worked very well in other Castleton Technology customer sites. Of course, other arrangements for training could be considered to suit the customer's specific requirements.

Training is scheduled so that set up sessions and systems control parameters are completed early on in the implementation.

End user training is usually planned to start a few weeks prior to live running so that staff do not forget what they have just learnt, and so that practice time can also be scheduled.

As soon as a successful data conversion has been carried out, the data would be loaded on to the training database ensuring that end users are trained on familiar data.

Training approach

The standard approach for module training is as follows.

Part One – Awareness Session

Each area of training (e.g. tenancy files, Board papers, property files, invoice processing, mailroom etc.) commences with an awareness session. During these meetings Castleton Technology and the customer's module team discuss all aspects of the forthcoming module implementation and plan for the future sessions.

Part Two – Database Scoping & Configuration

After basic system software installation, a database scoping day is scheduled. This is the time that the document categorisation, document repository structure are discussed with example of other sites available as a starting point.

Part Three – Standard Module Training Days

These days are usually delivered to the customer's module teams only.

The first training day would determine if the system is set up and working to the customer's expectations. It is possible that these days would identify further system set ups that would be undertaken as part of the testing and acceptance processes before delivering similar training to the final end users.

Castleton Technology's trainers attempt to spend as much time as possible on site with the customer, actually setting up parameters and user functions (due to our commitment to partnership), rather than explaining how to do things with various examples and then expecting the user to get on with it.

This approach means that we see results more quickly and, therefore, use training time more effectively, hence giving better value for money.

The above training approach, based on 'train the trainer', worked well with all of our customers and the customer is free to discuss the quality and effectiveness of our training with any of them.

Reviews

As part of our quality procedures course assessment documents are issued to all customer staff so we obtain valuable feedback. It's important

that Castleton Technology's trainers deliver the right level of training to all concerned thus ensuring that our new customer's staff proceed with confidence.

ACCOUNT MANAGEMENT

As soon as the initial applications are live Castleton Technology would appoint an Account Manager to:

- Maintain regular contact with our customer's staff on site
- Make our customer's management and staff aware of new software developments at Castleton Technology, and the benefits they could bring
- Help resolve any outstanding issues
- Provide ongoing advice and guidance on how to realise the best from the Castleton Technology systems installed
- Update our customers management on new company developments at Castleton Technology

The Account Manager is primarily targeted at ensuring long-term customer satisfaction.

USER GROUP & FORUMS

There are regular user groups to address issues and further development of Castleton products and services.

All our customers have access to the Castleton Forum where they can raise issues and questions.