

# Pilot Testing Your Club's New Software

By Bill Boothe

Pilot testing is a way of simulating the live operation of the new software within your club. The methodology is designed to allow the club's users to test the software in a laboratory setting by using realistic data and procedures.

Implementing new accounting, point-of-sale and reservations systems is a complex and time-consuming process. Most clubs begin by reviewing three or four alternative solutions and then arrange for on-site demonstrations of the software. They check references and often visit other clubs using the software under consideration. Once they have selected a winner, they have the vendor provide on-site user training and data conversion services. And, of course, they enter into an annual support and enhancement contract to keep the software current and user proficient. But is that enough to make sure the implementation goes smoothly?

In most cases our answer is a resounding NO. The process described above leaves out an important step – Pilot Testing –, which is designed to identify hidden issues and eliminate surprises well before going live with the new systems. Pilot testing is sometimes used prior to the purchase as a final test of the software's ability to meet the club's requirements. More often, it is used after the purchase as an addition to the training activities with the chosen solution. In either case, Pilot Testing is a powerful way to eliminate surprises and make sure that your club gets the most out of its technology investment.

### How it works

Pilot testing is a way of simulating the live operation of the new software within your club. The methodology is designed to allow the club's users to test the software in a laboratory setting by using realistic data and procedures. The actual testing takes place in a dedicated room or area of the club, where users run numerous transactions, procedures and reports as they simulate the software's functionality. Normally, pilot testing requires two to three weeks to complete.

### What you need

The following elements are needed for successful Pilot Testing:

**Pilot Testing Lab** – usually a small meeting or guest room, the lab must be available for four to six weeks and offer security and privacy. The lab must be available before and after regular business hours, since testing will be scheduled based upon user availability. The room should be big enough to accommodate eight to 10 people at a time with the equipment listed below.

**Pilot Equipment and Software** – equipment needs are dictated by the software applications being installed. Generally, you will need the following: Connectivity to the club's existing or new network server (where the new software applications are installed); two or three desktop PC's; one high-speed laser printer; two touch-screen POS PC's with check printers; two or three remote requisition printers; one bar code scanner; and one bar code printer (all of this equipment will be reassigned to users in the club a week or so prior to going live).

**Product Champions** - designated employees from each club department who will have the primary responsibility for the core application software (accounting, POS, reser-

ventions) once it is installed within the various club departments. Larger clubs will want to have a lead and backup champion for each core application. The champions do the actual testing.

**Testing Scripts** – are designed for each software application. The scripts consist of checklists of functions to be executed by the champions (i.e., “enter a new member – confirm that all information from the existing system can be accommodated by the new system,” or “enter a restaurant check with four covers – split the check and assign to two accounts – tender one check to a member account and the other to a guest room...”).

**User Training** – is provided to the champions before the testing begins. The software vendor comes on-site to deliver the training, which takes five to seven days, depending on the number of new applications (additional training is provided to the champions and other users after the testing is completed.)

**Issues Tracking** – the champions use an “issues report” to record the results of their testing. Each issue is described in detail and assigned a severity level. The report is maintained on the network in Word or Excel and is forwarded to the vendor every few days. Each issue is designated with an “open” status until it is resolved to the club’s satisfaction.

**Project Manager** – a qualified employee or outside resource assigned to the Pilot Testing project. This manager is responsible for the lab set-up and configuration, production of the testing scripts, monitoring of the testing process by the champions, and resolution of the issues identified.

## Benefits of pilot testing

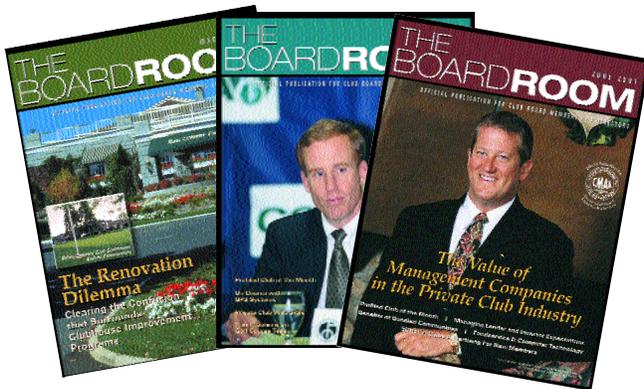
Many clubs spend the first year or so after going live on new software just getting to a level of productivity equal to what they had with their old system. Implementation horror stories abound – and in a majority of cases these disasters could have been averted with Pilot Testing. Ask yourself these two questions: “Can your club afford to spend X dollars (your budgeted amount) for new systems and show no real benefit for a year or more?” and “Can your club risk going live with a system that cripples operations for months while the kinks are worked out?” The answers are obvious.

Pilot Testing is a proven way to assure that your club gets the full and timely benefit of its technology investment. With it, you reduce your risk of start-up problems by identifying issues well before your live date. Without it, you take the chance of becoming another horror story. **BR**

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