ROADMAP TO SUCCESS
for the Transition to a New Select Agent Inventory System

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OBJECTIVES

RECOGNIZE the key issues that we encountered during the transition to a new Select Agent inventory management system
UNDERSTAND how we successfully completed our mission
LEARN from our mistakes

BACKGROUND

We had been using an electronic inventory system for ~4 years

We decided to purchase and install a new networked electronic inventory system

Objectives:

- PURCHASE the new system
- CUSTOMIZE it
- IDENTIFY one week to transition to the new system

In the transition week:
- EXPORT existing data
- DISABLE the old system
- TRAIN employees on the new system and use training to WRITE the new SOP at the same time

PERSONNEL NEEDED ON-SITE:
- Designer of new system
- RBL IT Director
- RBL Biosafety Officer
- RBL Research Manager

Our initial attempt: What went wrong?

PROBLEMS WITH FIRST TRANSITION

UNDERESTIMATED the complexity of the data export

Due to concerns about restricting access to Select Agent inventory data, we had only **described** our existing data to the new system's designer
New system designer & IT Director spent **the entire week** working on data export– which was originally planned for 1 day only

PANICKED employees when we ended the existing system

We had poorly communicated to employees that they would have **no access** to the existing system during the transition

UNDERESTIMATED the work required to re-write the inventory system SOP

This should have been done well in advance of the transition week

REALIZED we could not disable the old system and remove software/hardware

TIME TO CHANGE LANES

End of Initial Attempt and Message to Employees:
New system is on-hold; continue to use the old system
Transition to be rescheduled at a later date

During the next 6-9 months:
- Purchased additional customization that had been missed in planning
- Anonymized the Select Agent inventory data & provided it to designer of new system
  - This solved the data export problems
- Spent significantly more time planning the next transition
- Completed and bench-tested the new SOP in advance of transition
- Practiced the data export repeatedly
  - Executed two full mock data exports
- Est. at least **50 man-hours** needed for each of the above steps
- Total man-hours ~ 300-400

YOU HAVE ARRIVED!

Second Attempt-
Successful Completion of Transition:

COMMUNICATED the new timeline to all employees **frequently** and **clearly**

ENSURED all key people were available

TRAINED and retrained all employees prior to the transition

Day 1: EXECUTED the final data export
Day 2: BETA-TESTED the new system
Day 3: OPENED the new system for use

MAINTAINED the existing system as read-only for several weeks before disabling it

END ROAD WORK

CONCLUSIONS
1-Extremely time- and resource-intensive
   ~500 man-hours
   ~2 years from start to completion
2-Planning is as important as execution
3-Anonymize Select Agent data or get a Confidentiality Agreement to facilitate data export and transition

Contact Information

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