

Launching Your Location Platform

The Esri Guide



www.esri.com/LaunchGuide
Publication Date: March 8, 2016

Executive Message

Welcome!

Thank you for choosing Esri to help you with this new aspect of your business—launching your own location platform.

You are joining a thriving community of hundreds of thousands of people who use the power of location to make better decisions. You are engaging in a process that will transform the way you do business by enabling everyone in your organization to discover, use, make, and share location information, on any device, from anywhere, at anytime.

To help you get started, we have provided you with a simple guide for launching your location platform. This guide shows you how to prepare for and begin using location information as soon as possible. To use the guide most effectively, you should identify someone in your organization—a champion—who can spearhead the launch with determination, enthusiasm, and influence. The champion will be responsible for organizing the team, maintaining momentum, and delivering your vision for a successful location platform. If at any point you need support from Esri, we are here to help you along the way.

Congratulations on taking this transformative step. We are very excited about what you will accomplish as location information becomes a fundamental component of your business.

To use the guide most effectively, you should identify someone in your organization – a champion – who can take this guide and spearhead the launch.



Champion Message

Congratulations on making the power of location a core element of your business.

You are not alone. Thousands of organizations around the world have already made the same choice.

“Whether it’s finding the right street corner, power center, market, or trade area, location is a fundamental key to success for every retailer, restaurant, or service business.”

Gregg Katz

*Director of Innovation & Technology,
The Shopping Center Group*

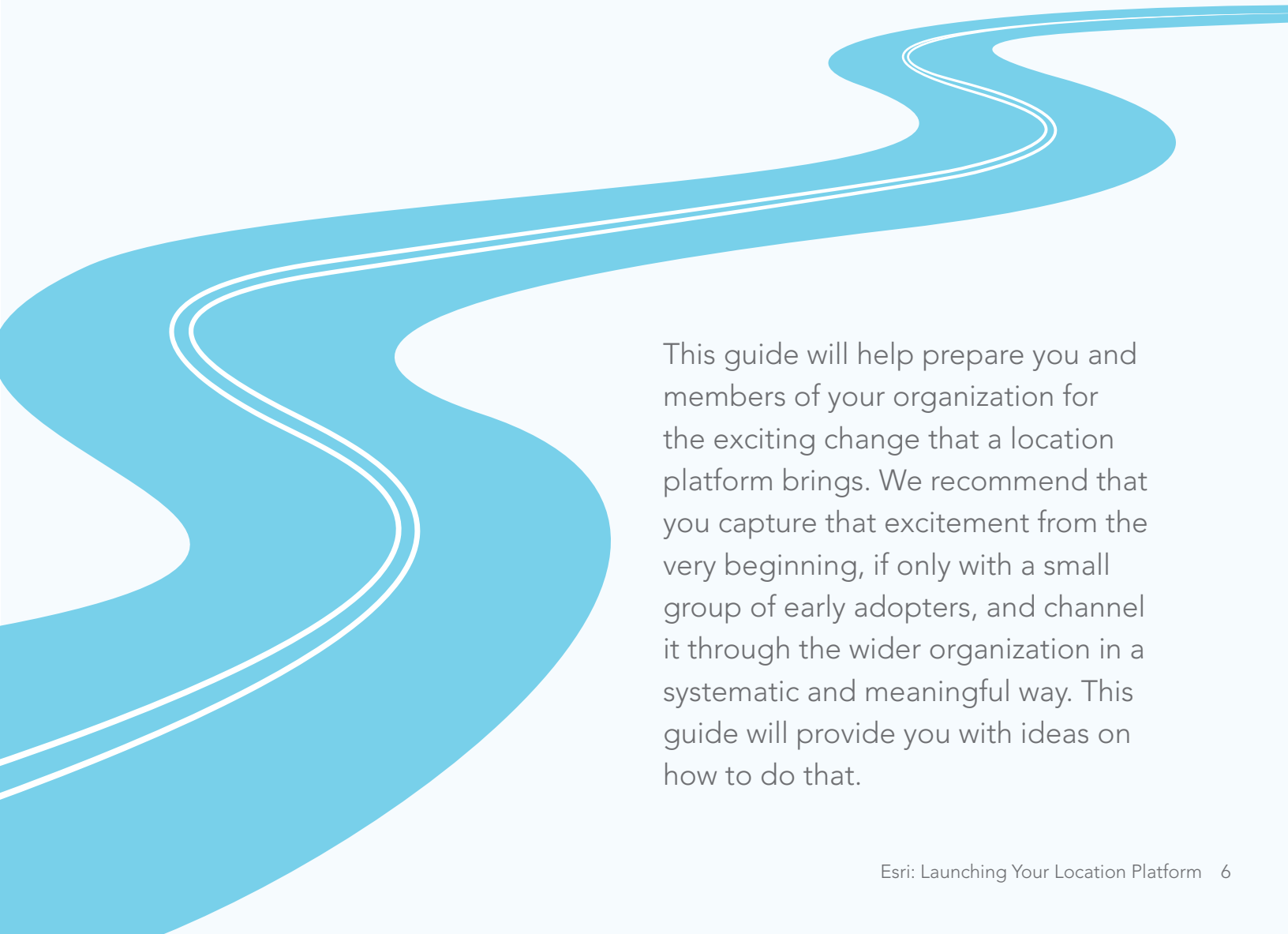
Why do you need this guide?



This guide provides the steps to help you launch the location platform for your organization. It will provide you with a strategy for successfully adopting this new technology within your organization.

Our extensive experience shows us that once people start using maps and working with location information, a whole new world opens up to them. Their jobs become more interesting and they get excited about learning how to do more. When they see data that is normally represented in a table, graph, or chart now symbolized on a map, their eyebrows go up. They lean in a little closer. They want to discuss what they are seeing and show others what they have accomplished. It is a new, powerful way to communicate.

If you have introduced new technology or systems to your workforce before, you know that you do not want people to be confused about why the change is taking place, who is responsible for performing tasks, or how to learn the new system as quickly as possible. You want change to happen without negatively affecting productivity and you want to anticipate people's concerns in order to be prepared to answer their questions as they come up.

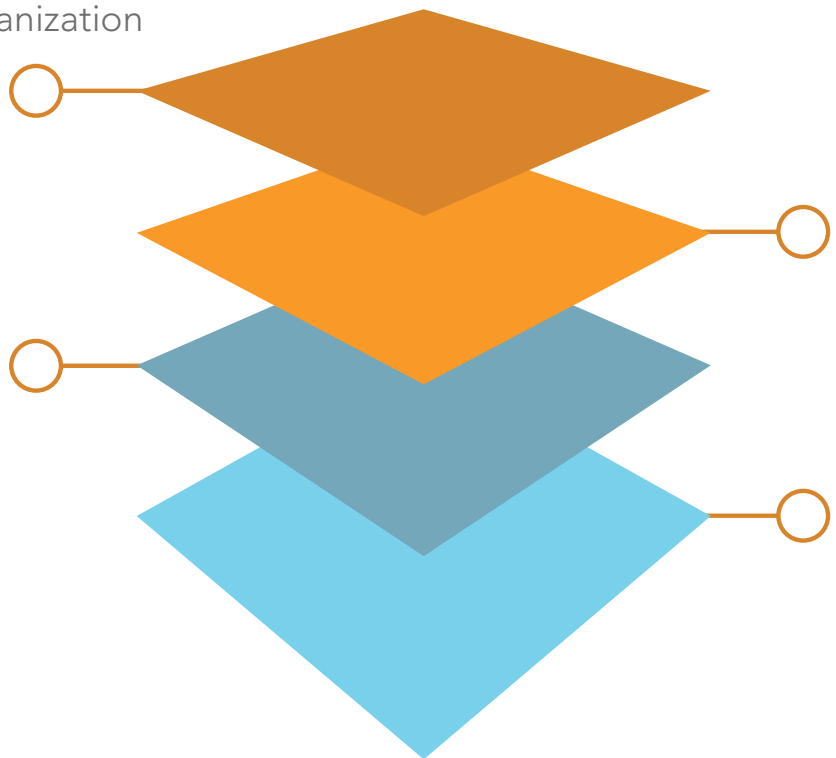


This guide will help prepare you and members of your organization for the exciting change that a location platform brings. We recommend that you capture that excitement from the very beginning, if only with a small group of early adopters, and channel it through the wider organization in a systematic and meaningful way. This guide will provide you with ideas on how to do that.

What's in the guide?

In the following pages, you will find:

- A strategy for planning, testing, and rolling out your new location platform.
- Examples, case studies, and quotes from customers who have implemented the location platform.
- Checklists, templates, and communication examples to help move you forward.
- Resources for self-help, training, and contact information for assistance.
- The [Change Management Kit](#), a collection of activities and promotional tools that can be used to engage and excite members of your organization during the implementation of your location platform.

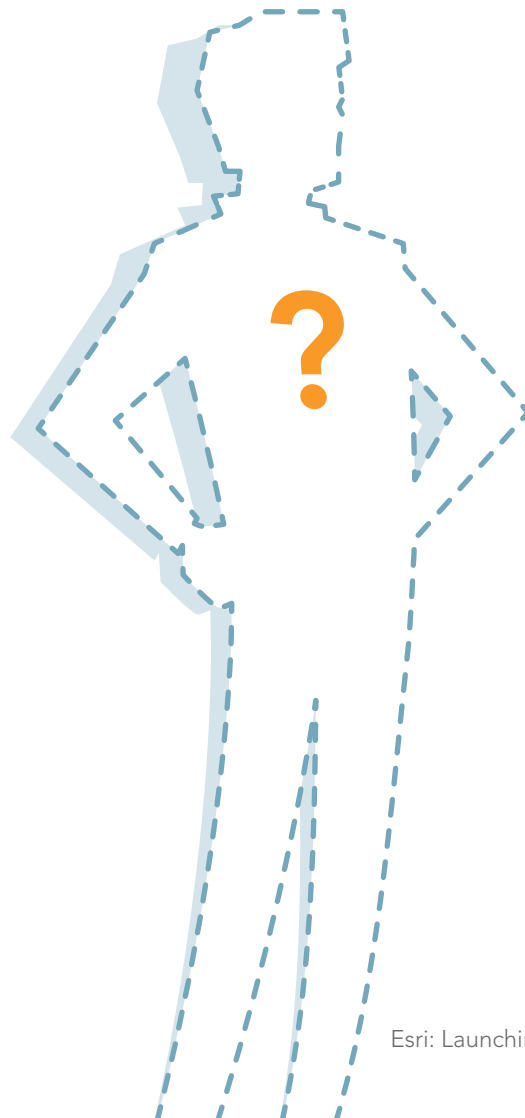


Who is this guide for?

This guide should be used by someone who is going to champion the launch of the location platform across the organization. Along the way, the champion will bring key people into the process to test, review, and provide feedback.

Key participants may include the following:

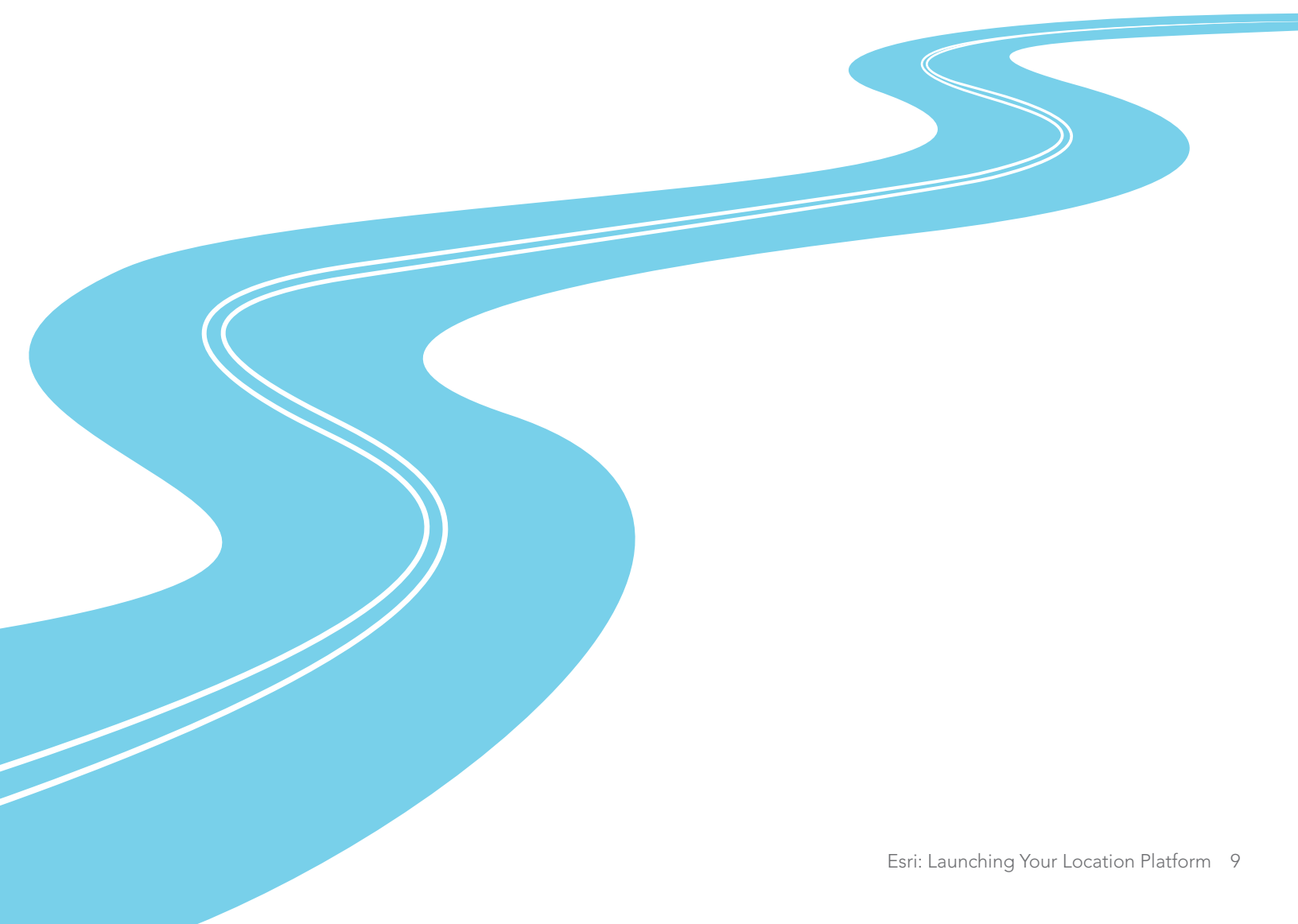
- Executive sponsor
- Business managers
- Key stakeholders
- Project manager
- Data or content administrator
- IT administrator
- Users



Do you have to follow the guide completely to be successful?

Every organization is different, and every implementation of the location platform will vary based on business needs. This guide outlines some of the best practices for implementing the location platform; however, you

may have your own methods that work for you or that you are required to follow. Use the guidelines outlined in this guide when and where applicable, and supplement the guide with your own methods as needed.

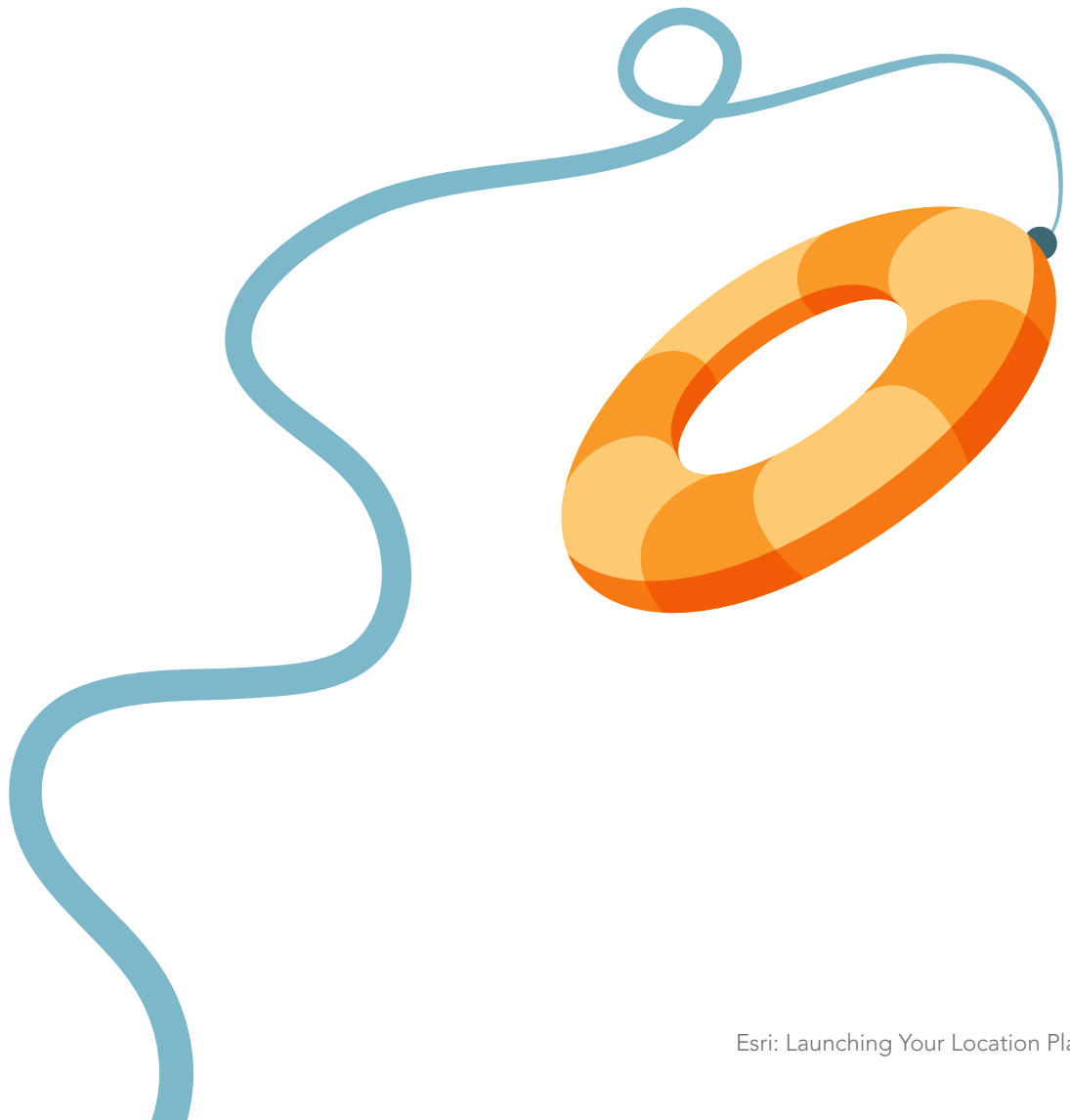


What if you need help?

If at any point in the process you feel that you need help, we are here to help you. This guide is designed to be user-friendly and provide you with many thoughts, ideas, templates, and practical examples for your rollout. However, if you do find yourself struggling or short on time, consider engaging with an [Esri representative](#). An Esri representative can help you champion the location platform across your organization.

“If you actually want to create something, create value, change behavior, but also make a new tool, you do it with Esri. They have the technology to do it, more so than any other company in the world. And, if you have an idea, if you want to understand something better, you’re dealing with the Esri culture.”

Jeffery Chernick
Cofounder of RideAmigos



ROAD MAP

There are five steps to launching your location platform. Follow these steps to ensure a smooth rollout of your location platform. The five steps to launch your location platform include:

- 1 Location Value Assessment 14
- 2 Pilot Project.....25
- 3 Production Rollout38
- 4 Operations and Support.....44
- 5 What's Next.....49



Checklist for Launching Your Location Platform

1

Location Value Assessment

- Conduct a kickoff meeting.
- Discuss how organizations in similar industries use location information.
- Assess workflows that would benefit from location information.
- Prioritize workflows.
- Summarize the implications that the workflows would have on your organization.

2

Pilot Project

Pilot project plan

- Identify the workflow(s) to be used in the pilot project.
- Identify the business areas and people involved.
- Define your products or deliverables.
- Define the data.
- Define the software.
- Define the infrastructure.
- Establish a communication plan.
- Create a training and support plan.
- Identify success measures.
- Identify constraints.

Implementation

- Set up your pilot environment.
- Implement training and support.
- Perform change management activities.
- Incorporate workflows.

Evaluation

- Evaluate pilot success.
- Evaluate production readiness.



3

Production Rollout

- Identify workflows to roll out to a broader set of users.
- Determine a comprehensive list of end users.
- Consider your organization's IT policies.
- Ensure that end users have access to required software.
- Implement your communication plan throughout the rollout.
- Extend your training and support plan from your pilot project to your larger user base.
- Identify success measures.
- Identify constraints.

4

Operations and Support

- Diagram your system infrastructure.
- Manage your data.
- Improve your production system.
- Provide ongoing training.
- Onboard new users.
- Provide technical support.
- Connect to user knowledge communities.
- Provide feedback to Esri.
- Celebrate success!!

5

What's Next

- Identify new business areas and workflows.
- Share location information and products throughout your organization.
- Stay engaged with your executive and key sponsors.

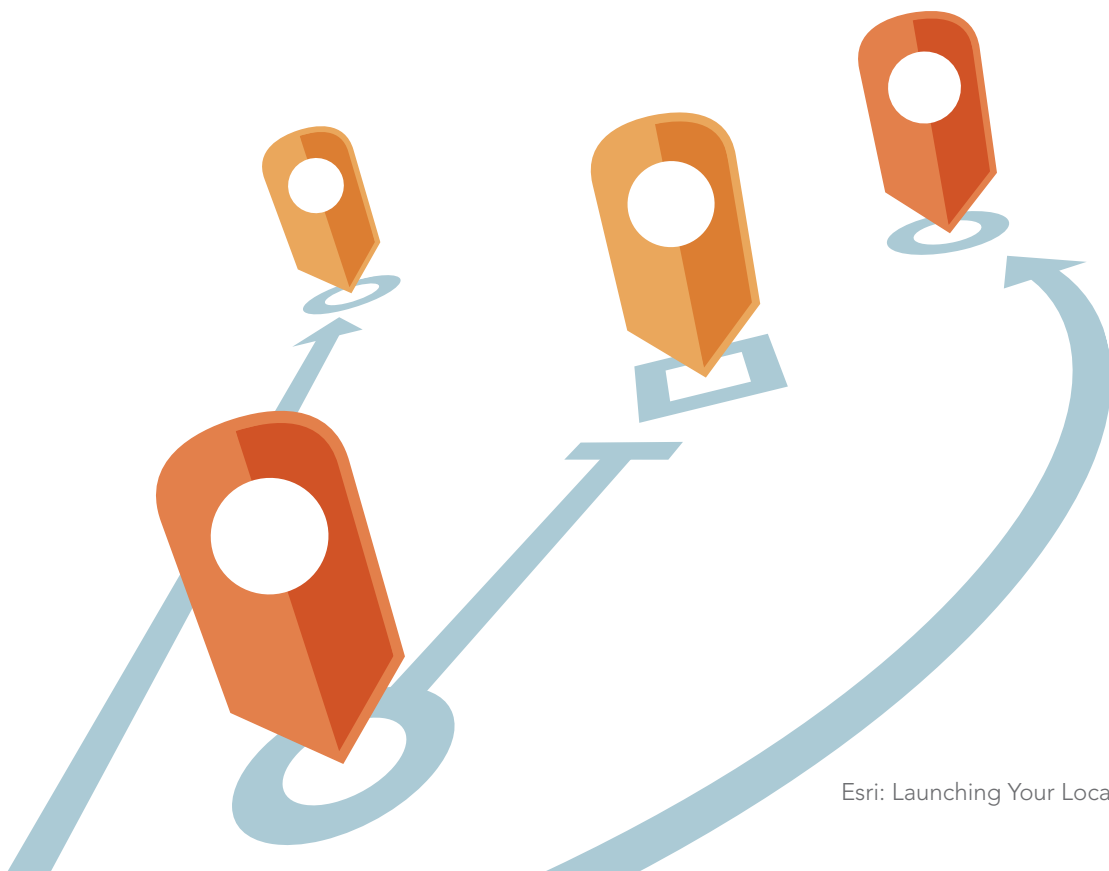
Location Value Assessment



The first step to launching your location platform is to assess where location information can add value to your business. Many organizations want to use location information to its fullest potential to make better decisions about their organization and their customers.

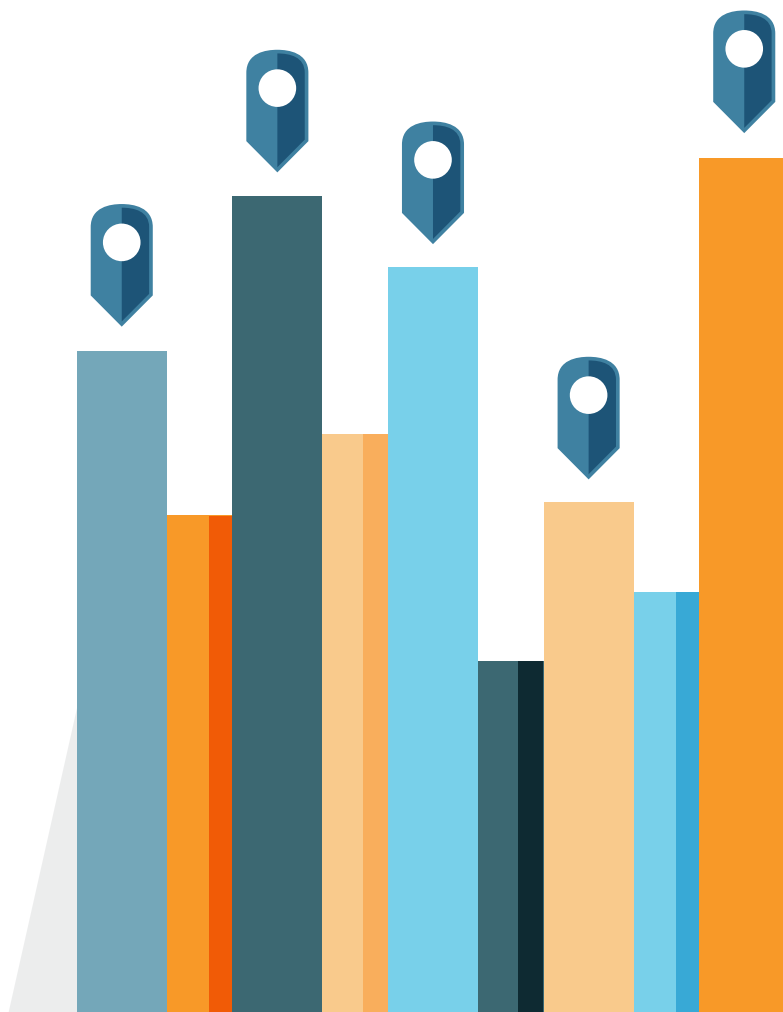
So how do you reap the benefits of location information? Based on our experience, one of the best ways to start this process is to conduct a location value assessment (LVA). An LVA is a step-by-step activity to determine which of your workflows can be enhanced from the addition of location information.

Once you start enhancing your workflows with location information, you will quickly see new patterns and trends that you never saw before. These patterns and trends will reveal insights and opportunities to help you make better decisions.



What will you accomplish in this step?

By the end of the LVA, you will have identified a set of workflows that can be enhanced with location information. You will have also prioritized these workflows to determine which of them will have the biggest impact on your organization. Based on these prioritized workflows, you will be able to provide your organization with a set of recommendations on how to proceed with the next step, the pilot project.



Conduct your location value assessment

An LVA consists of five steps:



Quote

"We just did not want to put dots on maps. We just did not want to enable our tabular data to be viewed. We wanted to do real analytics...we're building a process called "Push to Portal," which allows us to take all of our GIS-enabled data and be able to configure it using our location analytics for that particular site, push it out into the Internet, into our portal application so it allows that site [that dealer] to embrace all that data to help him better understand the competitive environment."

Bruce Wong

Manager of Advanced Network System, General Motors (GM)



Note

If you want help with your location value assessment, Esri can help you. For more information, please email location@esri.com

Kick off your LVA.

Step 1: Hold a kickoff meeting to prepare your organization for the LVA.

Conduct your LVA.

Step 2: Discuss how organizations in similar industries use location information.

Step 3: Assess workflows that would benefit from location information.

Step 4: Prioritize workflows according to the value they provide to the organization.

Step 5: Summarize the potential implications that these workflows could have on your business, data, applications, infrastructure, and people; and develop recommendations to move forward.

1

Hold a kickoff meeting

The best way to introduce the concept of an LVA is to hold a kickoff meeting with your executives and key stakeholders—the kickoff puts all the players on the same page and ensures common understanding and early buy-in up front.

First, identify your participants:

Meeting Participant	Role
Executive sponsor	Leads organizational change
Business manager	Manages personnel who use location information in their work
Key stakeholder	Wields significant influence on decisions; includes business users, IT staff, data subject matter experts

Who is your executive sponsor? _____

Who are your business managers? _____

Who are your key stakeholders? _____

Next, deliver a presentation to your participants. Based on your organization, you may have unique information to share. However, we recommend that you include the following in your agenda:

- Define the LVA.
- Establish the goal of the LVA.
- Review the steps of an LVA.
- Review the timeline.
- Establish participation levels.

As a result of your kickoff, your organization will be positioned to conduct the LVA.



Template Link

A template for the kickoff presentation can be found [here](#).



Note

The amount of time needed to complete the LVA may vary based on the level of complexity of your organization.

2

Discuss organizations in similar industries



Note

If you need help understanding how industries similar to yours are using location information, reach out to your Esri account manager.



Resource

You can visit Esri's [industry pages](#) to read more about how different organizations are using location information.

Start off your LVA by discussing other organizations like yours that are benefiting from location information. These organizations can be used as benchmarks for your own location platform. You can see examples of what other organizations have done by visiting Esri's [Location Analytics pages](#) and [industry sites](#). Spend some time reviewing these examples with your participants.

When you review these sites, you may notice common patterns in which people use location information, such as the following:

- Asset management
- Planning and analysis
- Field mobility
- Operational awareness
- Constituent, customer, and employee engagement
- Geo-enabling of other business systems

Review some of these patterns and examples with your participants.

Manage asset and resource information

Consider the location of your organization's assets, their characteristics, and the spatial relationship among your assets, customers, and other points of interest. We use the term assets broadly to refer to an organization's people, facilities, and infrastructure. Location technology provides an effective way to collect, organize, and exchange up-to-date asset information.

For example, understanding which assets need routine maintenance can reduce the likelihood of failure or service interruptions.

Facilitate better planning and analysis

Organizations must understand how to sustain operations, create growth, and plan for the future. You can use location information—such as demographics or sales data on a map—to analyze the relationships among people, places, and things. You can then use that information to answer questions like: Where do we build a new school? Where should we establish bus routes or service centers? Where should we direct our marketing campaign based on customer information?

For example, understanding the location of customers can show where you have gaps in service or trade areas with insufficient coverage.



Resource

If your LVA participants need additional context for identifying location-based workflows, watch the following [training seminar](#) (60 minutes) together and then start the activity.

Enable field mobility

Many organizations have field teams and resources in the field. In many cases, remote staff are an organization's greatest investment. Being able to get information to and from the field makes for smarter decisions and lowers operating costs. Location technology allows your organization to collect data and access it from mobile devices in the field.

For example, teams in the field can collect information about customers and identify patterns based on their location that will allow for better decision making.

Provide a comprehensive view of operations

Location information can provide your people with a comprehensive awareness of the environment and events affecting your organization. Members of your organization can visualize weather events, customer trends, and your key performance indicators in real time on a dashboard.

For example, this operational awareness ensures that all executives are making decisions from the same, authoritative data.

Engage with employees, constituents, and customers

Sharing location information with your stakeholders allows you to build stronger business relationships. Understanding their needs enables you to improve your products or services.

For example, cities work with residents to reduce vandalism, and businesses participate in social media dialog to manage their reputations.

Geo-enable other business systems

Adding mapping and location information to your business applications (e.g., customer relationship management, business intelligence) can enrich your view of the world. You can analyze your data to discover new patterns and solve business problems. You can share this information across the organization to foster collaboration.

For example, gaining new insights into customer responses to marketing campaigns can increase the effectiveness of marketing spending.

Now that you have looked at several examples of how other organizations leverage location information, you are ready to evaluate how your organization can use location information to improve its workflows.

3

Assess workflows



Resource

If you need help identifying and organizing workflows that use location information, use the Data, Data Everywhere activity found in the [Change Management Kit](#).



Template Link

A template for the assessment and prioritization of recommendations can be downloaded [here](#).



Tip

Your LVA may identify a large number of business functions and workflows. Consider engaging with a project manager to help facilitate the LVA.



Note

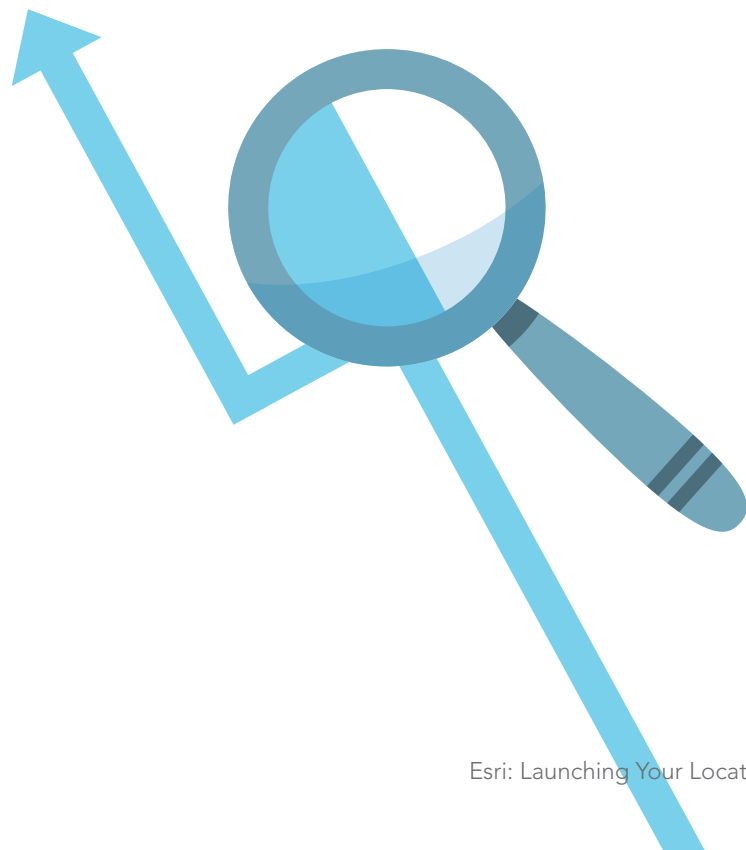
If you need additional help identifying workflows that will benefit from location information, reach out to your Esri account manager.

In this activity, LVA participants will identify current and new workflows that may benefit from location information.

To start the activity, divide participants into their respective business areas, such as marketing, support, operations, finance, and sales (or into groups you consider appropriate for brainstorming sessions).

In each breakout session, identify workflows that can be enhanced by the addition of location information.

- For each business area, **outline** the major functions.
- **Determine** which functions have workflows that could benefit from location information.
- For each of these functions, **identify** workflows that could be enhanced (made more efficient, more cost-effective, or otherwise improved) by the use of location information.
- **Explain** how these workflows could use location information to add value to the organization.



4

Prioritize workflows

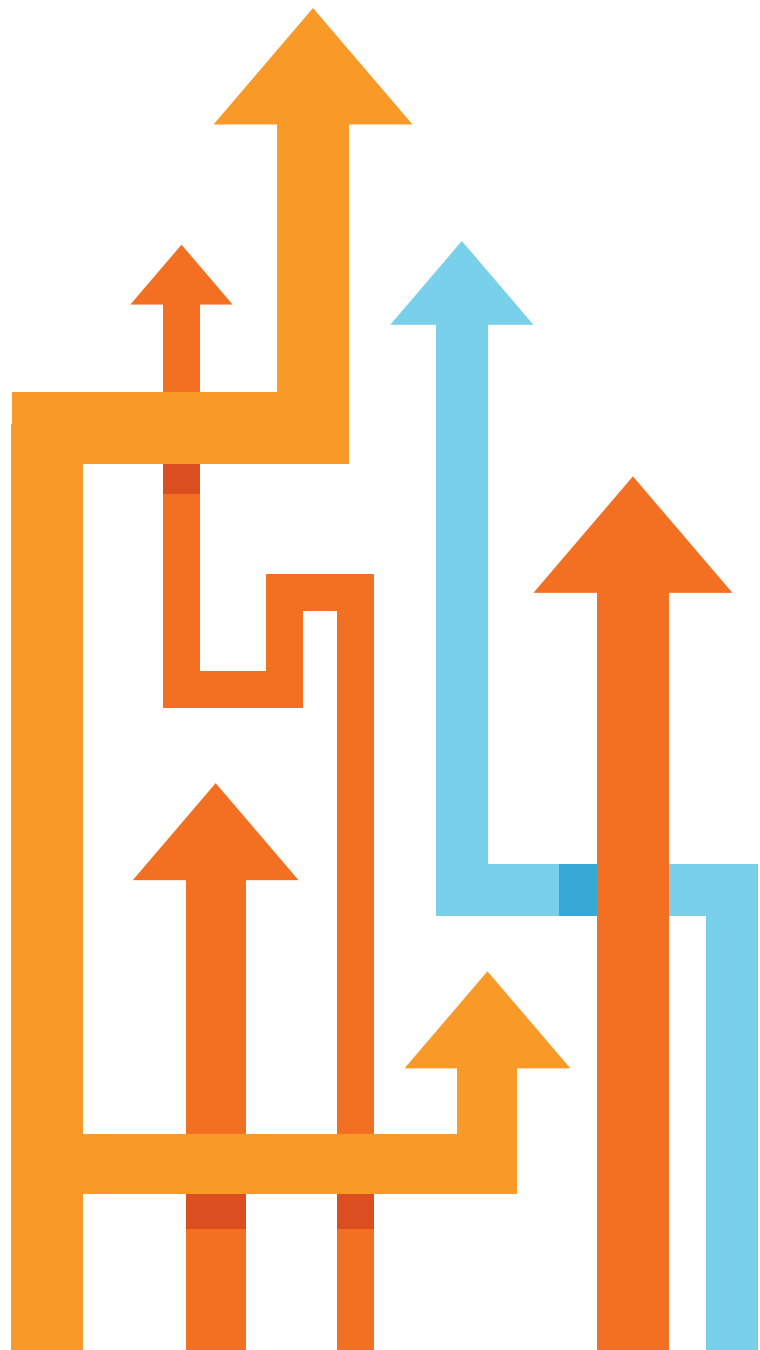


Note

At this point, your workflows may be fairly large and cover a wide scope. If needed, consider breaking your workflows into smaller, well-defined tasks. Based on your workflows, formulate a business question to solve. Adding questions to your workflows can help focus your scope.

After the brainstorming session, ask each group to complete the following:

- **Prioritize** workflows according to their importance or impact. This ranking will help determine the order in which your organization should proceed. When prioritizing, consider organizational needs, business objectives, and potential benefits.



5

Summarize the potential implications

To proceed with your pilot project, you may need to create a summary for your key stakeholders and executives. Review your list of workflows and their added value with your key stakeholders and executives and determine which workflows to implement in your pilot project.

When you present this information to your stakeholders and executives, they may ask how these workflows will affect the framework of your organization, including business areas, data, applications, infrastructure, and people. In your pilot project, you will spend more time identifying the implications on these areas, but now is a good time to start thinking about how this will affect areas of your organization.

Category	Task
Business	Consider how these workflows affect not only your business area but all business areas in your organization
Data	Consider the need for data collection, storage, and management that may result from enhancing these workflows
Applications	Consider needed applications and describe how they support your workflows
Infrastructure	Consider the hardware and network systems needed to support applications
People	Consider the people or roles needed across the organization to implement and maintain operations and change management activities

Summary of accomplishments

Congratulations! You are one step closer to launching the location platform in your organization. In this step, your organization:

- Identified the value that location information can add to your organization.
- Identified the workflows that can be enhanced through the use of location information.
- Prioritized those location-enhanced workflows.
- Summarized the potential impact those workflows will have on your organization.



Pilot Project



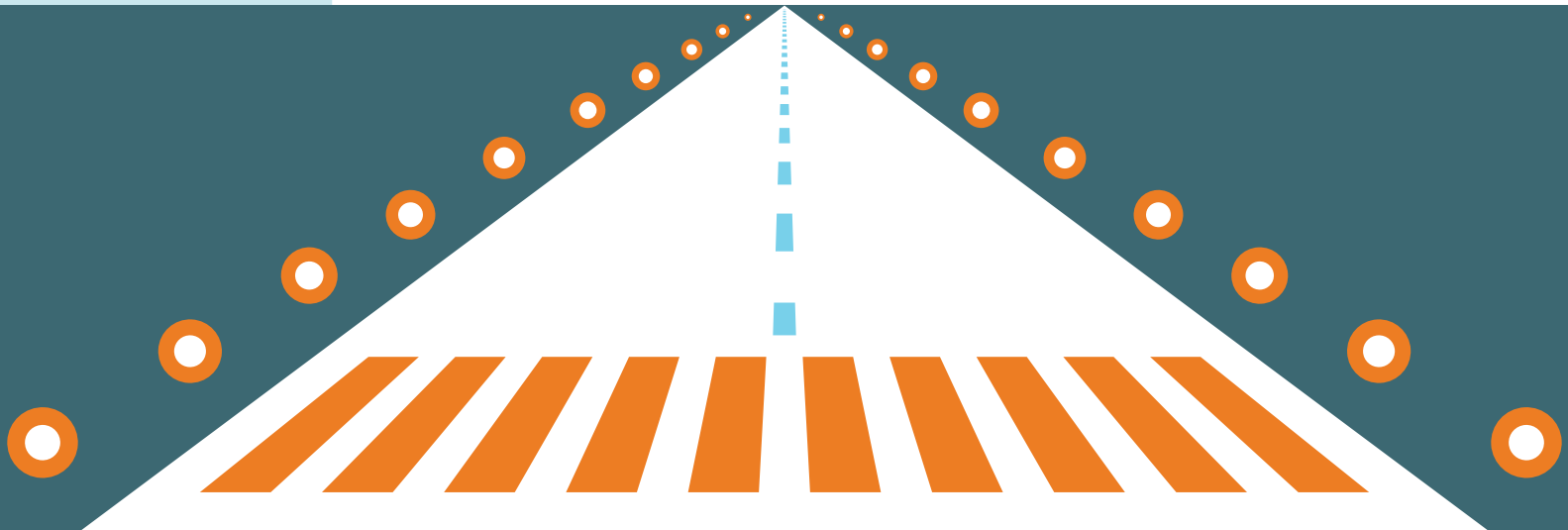
Once your LVA is complete, the next step is to conduct your pilot project. In your pilot project, you will implement a subset of your workflows for one or several business areas. It is important to start with a subset so you can verify that you have a solid plan before moving into a full production rollout.

The pilot project also allows your organization to validate the business value added from incorporating location information into your workflows. By the end of the pilot, you will have concrete evidence of how location information enables better business decisions. Having concrete examples that you can show to others in your organization is a great way to build enthusiasm for using location information!



What will you accomplish in this step?

By the end of this step, you will have implemented and tested a subset of your workflows, determined the business value you added, and secured a decision from key executives to move into a production rollout.



Conducting a pilot project



To conduct a pilot project:

1. Develop a pilot project plan.

- Identify the workflow(s) to be used in the pilot project.
- Identify the business areas and people involved.
- Define your products or deliverables.
- Define the data.
- Define the software.
- Define the infrastructure.
- Establish a communication plan.
- Create a training and support plan.
- Identify success measures.
- Identify constraints.

2. Implement location-enhanced workflows.

- Set up your pilot environment.
- Implement training and support.
- Perform change management activities.
- Incorporate workflows.

3. Evaluate readiness for production.

- Evaluate pilot success.
- Evaluate production readiness.



Note

If you want help with your pilot project, Esri can help you. For more information, please email location@esri.com

1

Develop a pilot project plan

A plan for your pilot project is important. It prepares your organization to implement the workflows identified in the LVA.

The following activities shape your pilot project:

Identify the workflow(s) to be used in the pilot project

Of those workflows you identified and prioritized in your LVA, determine which ones your organization will test in your pilot project (if you have not already done so). When determining your workflows, your organization may decide to focus on all the workflows presented by one business area, or on a sampling of workflows from several or all business areas. Either approach will work.

Identify the business areas and people involved

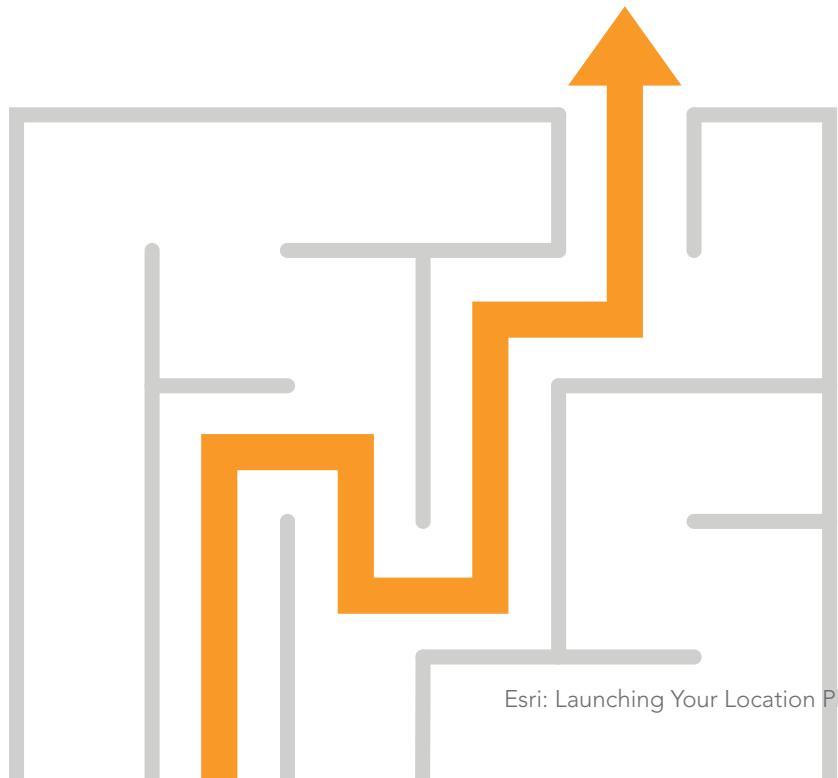
Based on your identified workflows, determine which business areas will be involved in the pilot project. Will you include one business area or several? Once you have identified your business areas, think about which people will be involved.

Remember, this is a pilot project, so you should only involve a subset of people from each identified business area. In your production, you will roll out your identified workflows to all users in each business area.



Resource

Watch the [Best Practices for Your ArcGIS Online Organization](#) training seminar to observe how to quickly create interactive maps and apps and share them with the rest of your organization.



Consider the following roles:

Role	Related Planning Activities
Champion	<ul style="list-style-type: none">• Communicates the results of the LVA• Promotes and leads the project
Executive sponsor	<ul style="list-style-type: none">• Demonstrates organizational approval and support for the pilot• Authorizes funding or commitment of resources
Project manager	<ul style="list-style-type: none">• Documents the pilot project plan and the current and modified workflow designs• Builds project budget and timeline with resources, milestones, and deliverables• Establishes plans for stakeholder communication, user training, and technical support
Data or content administrator	<ul style="list-style-type: none">• Plans how to provide access to content or data in order to support data requirements
IT administrator	<ul style="list-style-type: none">• Prepares blueprints for applications and infrastructure architecture
User	<ul style="list-style-type: none">• Implements and adopts new workflows

Define your products or deliverables

Next, think about what you want from your location platform. How do you want to convey your results? Do you want to create maps, apps, dashboards, graphs, reports, or charts? Will you share your results with many or limit results to individual users? Do you want your products to be accessible from mobile devices (e.g., allowing field workers to access your information)? Do you want to feed your location information or products into any other business system?

Define the data

Next, you need to consider your data. What location data will you need to build your deliverables? Think about what datasets you currently have and what datasets you might need to acquire. If you have a geographic information systems (GIS) department in your organization, the GIS staff might have datasets that you are not aware of, so leverage that department's library of resources.

When thinking about data, consider who owns the data, who will manage and maintain the data, how the data will be shared, what type of data permission you have, and who oversees the accuracy of the data.



Tip

Getting your data or content administrator involved with this step is essential.



Tip

Getting your IT administrator involved with this definition of your software and infrastructure is essential.



Tip

Getting your project manager involved with this step is essential.



Resource

If you are looking for ways to excite and engage new users through hands-on experience, use the Lunch and Learn activity in the [Change Management Kit](#). You can also find posters here to help communicate events associated with the launch of your location platform.

Define the software

Determine what software you will need to analyze your data and create your deliverables.

Your organization can lay the foundation to its location platform by setting up an ArcGIS Online organizational site. ArcGIS Online is a cloud-based mapping platform.

Depending on the types of deliverables or data you need, you may be able to take advantage of data sources, out-of-the-box applications, and ready-to-use maps that are easy to access from ArcGIS Online.

IT teams can get more details in this [Administering Your Location Platform: Best Practices and Resources](#).

Do not forget to reach out to your Esri account manager if you need help defining your software.

Define the infrastructure

During the planning stage, it is important to think about your organization's infrastructure and how support systems (for example, hardware and software) will work together. Plan to provide a testing or staging environment for pilot applications and connections to data sources.

Establish a communication plan

Depending on the workflows you have chosen, you may have multiple business areas involved in the pilot project, or just one. However, in addition to your business area(s), you will also have people from your IT team and possibly others from your organization involved. When you have many people working together from several teams, it is important to develop a well-thought-out communication plan to keep everyone moving in the same direction.

To maintain engagement, your communication plan should include the following:

- Consider communicating in varying formats such as email, phone, fliers, or meetings.
- Maintain communication throughout the project to ensure that stakeholders are well informed for the duration of the project.
- Communicate the timeline to guide the project and keep the team on track.



Resource

To get started with training, take a free training seminar. For example, before starting a pilot project, your team can review a one-hour, self-paced training video about spatial analysis.

[Gain Geographic Insight with ArcGIS Online Analysis Tools](#)

As you get ready to set up your organizational account, your IT administrator should take some basic training.

- [Preparing to Implement ArcGIS Online](#)
- [Configuring and Administering an ArcGIS Online Organization](#)
- [Performing ArcGIS Online Administrator Tasks](#)

Create a training and support plan

A training and support plan for your pilot project will ensure that participants are able to use the tools appropriately and get help when needed. Make sure that your team (users, data or content administrators, and IT administrators) is empowered to perform the tasks ahead of them.

The major training and support planning activities include the following:

- A. Determine training and support needs for your team members.
- B. Set up a resource center.

A Determine training and support needs for your team members

Determine **who** should receive training, **when** training should occur, and **what** topics should be covered in the training.

- Consider **who** will need to learn new workflows and who will be responsible for managing the technology and data that support those workflows.
- Consider timing and frequency (**when**). At what phases during the pilot project will people need training? Before? During? After? Also consider how often you will need to offer the training.
- Consider **what** topics need to be part of the training plan. For example, your data administrator might need training on finding and maintaining data, and your IT administrator might need training or implementation support for configuring and administering an ArcGIS Online organizational site.

The **who**, **when**, and **what** are important, but you should also consider different types of training (individual vs. group, onsite vs. virtual, videos vs. courses). All these considerations together will ensure that you develop the best training and implementation plan for your team. Visit the Esri Training [site](#) for course suggestions or the Esri Professional Services [site](#) for implementation support.

The Esri Support [site](#) provides technical support, including resource centers, knowledge bases, and online communities that can help your users as they learn, continue to use, and maintain your location platform.

If you would like help with any aspect of your pilot project, please [contact us](#).



Note

If you want help with your training plan, the Esri Training team can help you craft a staff development plan tailored to your organization. For more information, please email location@esri.com

B Set up a resource center

After identifying all your training and support resources, you should put those resources into a common location for easy access. Consider the following steps:

- Develop a resource center or knowledge base to organize and store your training and support resources.
- Provide access to the resource center so that others can use the resources as needed.
- Determine who will maintain the resource center.
- Determine additional features of your resource center based on your organization's requirements. For example, you may want users to be able to contribute content to the resource center, or you may want to set up tools for collaboration.

Identify success measures

To evaluate your pilot project, determine success measures. Useful measures are:

- Defined.
- Agreed on.
- Prioritized.
- Limited to a critical few.

Success measures might include:

- Financial figures.
- Productivity rates.
- Relationship metrics (for example, satisfaction scores).

Identify constraints

In the last step of the planning phase, you should identify any constraints that might affect the design of your pilot project. All projects have some constraints—for example, schedules, costs, and scope. Other constraints may relate to your organizational framework—for example, access to systems, data, content, or pilot users. Knowing these constraints will allow you to plan your pilot project accordingly.

2

Implement location-enhanced workflows



Tip

Throughout the implementation of the pilot project, continue to update stakeholders on the project status.

Now that you have a well-organized project plan, your organization is ready to set up your pilot project, implement your training and support plan, perform your change management activities, and incorporate your workflows.

Set up your pilot environment

Setup activities include the following:

- Acquire the data that you need and set up a plan for continued data quality and maintenance.
- Deploy the hardware, software, and networking components needed to support your location platform. This deployment should include setting up your ArcGIS Online organizational site and adding users.
- If Esri's Location Analytics tools are part of your plan, configure your location platform to connect to your business systems (for example, business intelligence, customer relationship management, productivity applications) and location-based data.

Implement training and support

Training and support activities include the following:

- Empower members of your organization by implementing your training and support plan.
- Deploy training and support materials to the resource center.
- Schedule courses and communicate training options to your users.
- Monitor the effectiveness of your training and support, and refine your training and support plans based on feedback from trainees.

Perform change management activities

The key to the success of your pilot project is change management. Change management expedites the adoption of your pilot project because it keeps everyone engaged, informed, and working toward a common goal.

Change management activities include the following:

- Gain buy-in by enlisting change agents, celebrating early successes, and promoting user engagement.
- Implement your communication plan to update stakeholders on project status, notify users of when to take action, and provide direction to support resources.
- Get people to use the system by monitoring and influencing adoption. Identify who is or is not leveraging new workflows. Remove barriers that inhibit change.

Incorporate workflows

Up to this point, you have done a lot of planning and preparation. Now it is time to incorporate your workflows into your location platform! This is where it gets exciting because you will see the value that adding location information to your workflows brings to your organization.

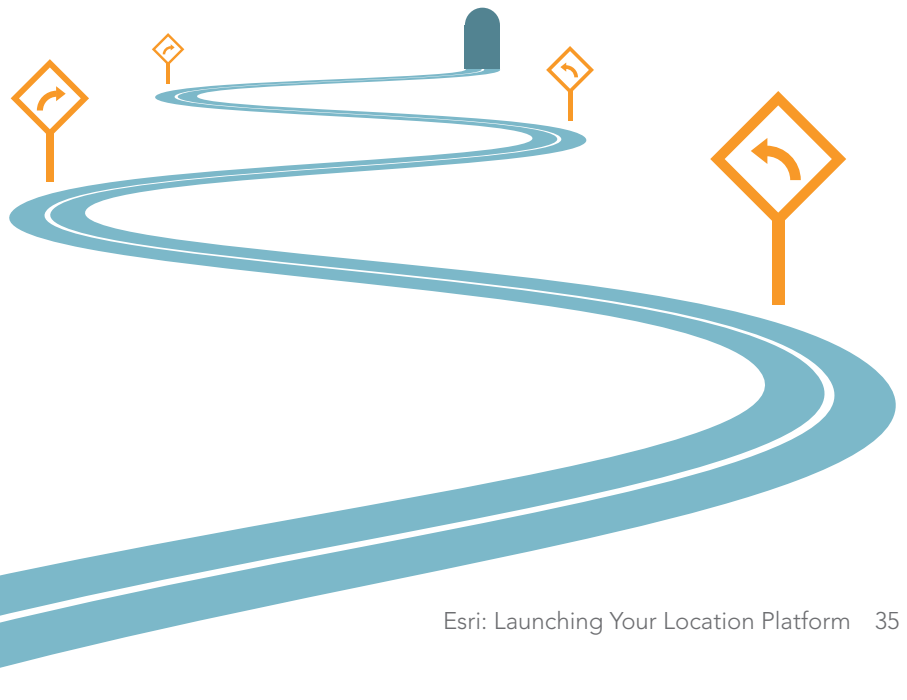
Activities include the following:

- Implement and test location-enhanced workflows.
- Create and share maps and reports.
- Continue to oversee and manage user accounts.



Tip

When testing your workflows, start with a small subset of data to determine your methodology. This will increase your efficiency and allow you to better manage your ArcGIS Online account and resources.



3

Evaluate readiness for production

Now that your pilot project is complete, use the success measures defined in the pilot project plan to evaluate your success. Was the pilot successful? What was the value added to your business? What issues did you encounter?

Similarly, you should evaluate production readiness across your organizational framework:

Business	Assess the ability to achieve identified desired results for new and enhanced workflows using success measures
Data	Review data and content quality
Applications	Monitor and review applications and system performance
Infrastructure	Monitor and review demands on infrastructure
People	Contribute user and administrator feedback to refine workflows

Also consider conducting a meeting with a group of users to gather feedback on their satisfaction with your pilot.

As a result of this review, your organization can communicate successes, limitations, and production readiness to stakeholders.

Once you have demonstrated the success of your pilot to your decision makers, and have secured their approval, it is time to move forward with your production rollout.

Summary of accomplishments

Congratulations! You are one step away from rolling out your location platform to your entire organization. In this step, your organization:

- Implemented a pilot project with a subset of business areas and workflows.
- Demonstrated the value that location information can add to your organization.
- Developed training, support, and communication plans that can be carried through your production rollout.
- Secured a decision from key executives and stakeholders to move into production.



Production Rollout



Now that you have completed your pilot project and have seen the benefits that location information adds to your workflows, it is time to see this impact on a grand scale by rolling out your enhanced workflows to all users in your identified business area(s).

Launching your location platform on a larger scale involves a higher level of organizational commitment than a pilot project requires. Characteristics of a production rollout include the following:

- Greater capacity for number of users in diverse locations
- Formal and ongoing training, technical support, and maintenance
- Higher standards for changing the production environment
- Formal communication and transitions to new systems and workflows
- Decreased user feedback over time
- Sustainable end state

What will you accomplish in this step?

By the end of this step, you will have rolled out a full production system and implemented your pilot workflows with all users in your identified business area(s).





Quote

“Services provided in the port must be fast, safe, cost-effective, reliable, and environmentally friendly. We put GIS into action to achieve a free flow of the ships in the port.”

Rob Slegterhorst
Port of Rotterdam

Watch the video [here](#).



Tip

Once you have invited members to join the organization, you should provide them with basic steps for becoming an active member. Here are a few suggestions:

- [Join the organization](#).
- [Update your profile](#).
- [View maps in the map viewer](#).
- [Make your first map](#).
- [Make your first app](#).
- [Start learning the language of spatial analysis](#).

Consider sending some of your power users to formal training:

- [Training options for ArcGIS Online administrators](#)
- [Training options for ArcGIS Online publishers](#)
- [Training options for ArcGIS Online users](#)



Note

If you want help with your production rollout, Esri can help you. For more information, please email location@esri.com

The main steps of a production rollout are similar to that of a pilot project. You still need to think about workflows, people, software, communication, training, support, success measures, and constraints; but there are a few key distinguishers which we have listed below.

Workflows

Focus your production rollout on the workflows you implemented and tested during your pilot project(s). Make sure you review the user feedback gathered during the pilot, and incorporate any changes needed before the rollout begins.

Remember that you are rolling out the workflows that you tested with a subset of people in your pilot project to a broader set of users in each identified business area.

People

Speak to your business area managers to determine a comprehensive list of end users. These are the people to whom you will provide software, communication, training, and support. Now that you are rolling out your location platform to a wider group of people, additional IT personnel may be needed as well.

IT policies

Unlike a pilot project, a production rollout requires you to consider your organization's policies for production systems. In many cases, your production rollout will need to comply with your organization's existing policies. In some cases, your production rollout will require your organization to set new policies. Following are examples of policies to consider:

- User access, sharing, and governance
- Data management
- Internal and external security
- Mapping and brand standards
- Data and software licensing

Software

Work with your IT administrator to ensure that all users have access to the software they need. IT teams can get more details in this [Administering Your Location Platform: Best Practices and Resources](#).

Communication

Throughout the production rollout, continue to update stakeholders on the status of the project. Let users know when to take action—for example, when to start using the system. You probably have a much larger set of users in your production rollout than you did for your pilot, so take the time to create a well-thought-out communication plan.

Training and support

Take the training and support plan that you created in the pilot project and extend it to your larger user base.

Success measures

With any project, identifying success measures is important. Just as you did for your pilot project, identify success measures for your production rollout. Doing so will allow you to assess whether the production rollout achieved its desired business results.

Constraints

Identify any constraints that might affect your production rollout. Identifying these constraints will allow your organization to understand where problems may occur as well as how to work around these constraints to ensure long-term success with your newly implemented location-enhanced workflows.

Your production rollout ends with a transition to sustainable operations and support. More information regarding operations and support can be found in the next step of the guide.

Summary of accomplishments

Congratulations! You have now completed your production rollout, and your organization is well on its way to adding business value through location information. In this step, your organization:

- Rolled out a full production system.
- Implemented your pilot workflows with a broader set of users in your identified business area(s).



Operations and Support





Congratulations on launching your location platform!

It is now time to think about how your organization needs to support and maintain your platform. In this step, you will set up an operations and support structure to ensure that business value is maintained.



Quote

“Working with Esri is helping our company maintain its distinct market presence across brands and reinforce the specialty store experience throughout its 2,500 locations.”

Kevin Ryks

Director of Financial Planning,
Maurices Incorporated

Operations and support activities include the following:

- Diagram your system infrastructure.
- Manage your data.
- Improve your production system.
- Provide continued training.
- Onboard new users.
- Provide technical support.
- Connect to user knowledge communities.
- Provide feedback to Esri.
- Celebrate success.

Diagram your system infrastructure

To provide adequate support to users and ensure that your operations continue to run smoothly on new systems, it is important to keep track of how your IT personnel have set up the infrastructure for your location platform. We recommend that your IT personnel diagram the infrastructure architecture to help support the system.

Manage your data

When transitioning from your production rollout to ongoing operations, it is important to maintain documentation about data relationships and quality controls. Tracking information about the sources of and changes to data can help to ensure its consistent use across the organization.

Improve your production system

You can improve your production system by periodically evaluating its business value and technical performance.

- Business value is the system’s ability to achieve desired results.
- Technical performance refers to the operation of your applications and infrastructure.

Conduct both business and technical operation reviews at least once per quarter. As part of those reviews, ask users for feedback or enhancement requests.

Provide ongoing training

As new technology is released, ensure that the members of your organization (users, data or content administrators, and IT administrators) remain current in their skill sets. Also, as your members start to expand their use of the platform, make sure they have access to advanced training options as needed.



Note

If you want help with your training plan, the Esri Training team can help you craft a staff development plan tailored to your organization. For more information, please email location@esri.com



Resource

GeoNet is a place to share, chat, and collaborate on all things geo. In addition, users have the Esri Blog, Industry based Communities, and the Help.

- [Blog](#)
- [Communities](#)
- [Help](#)
- [GeoNet Forums](#)

Onboard new users

Determine necessary processes to onboard new users. Consider the following components when determining an onboarding process.

- Workflows—Identify what workflows will affect new users.
- Software logins—Identify account logins and permissions for new users.
- Training—Determine appropriate training for new users by considering the workflows that will affect them.

Provide technical support

Technical support responds to the technical needs of your organization. Determine how your organization will provide technical support and consider how [Esri Support](#) can help you.

Connect to user knowledge communities

Your users can connect to knowledge communities for support, guidance, and insights into new trends. Knowledge communities bring numerous users together to share resources, ask questions, and collaborate. These communities may be internal or external.

Internal knowledge community

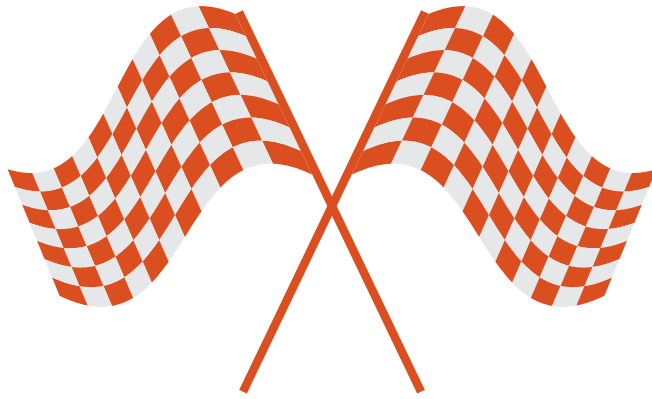
- Enables your organization to provide information exclusive to your organization to retain knowledge of new tools and maintain enthusiasm among the organization when using location-enhanced workflows.
- Enables members of your organization to collaborate on projects in a private setting.
- Enables members of your organization to support each other through the adoption process and in ongoing operations.

External knowledge community

- Connect to external knowledge communities to gain a stronger understanding of new tools and address questions about the location platform.

Provide feedback to Esri

Feedback from your organization and other organizations may influence the research and development of Esri software. Please let us know how the design of Esri software can help you achieve optimal business value. The best channels for that feedback are through the Esri [ArcGIS Ideas](#) website or through the Esri account manager for your organization.



Celebrate success

Celebrating success is a great way to keep members of your organization excited about your location platform. Continue to show members of your organization the value that location information has added to your organization through presentations, videos, and other excitement builders. Remember to always celebrate success and continue to motivate members of your organization.

What's Next



Now that your production system is functioning, it is time to think about your next steps.

Consider the following:

- Start to identify new business areas and workflows that will benefit from location information. These business areas and workflows may have already been identified as recommended workflows from your LVA, or you may choose to conduct another LVA. Once you identify these workflows, you can implement them through a pilot project and a production rollout. Over time, you may need to refresh your LVA to consider new business objectives, technology, and industry practices.
- Your existing user base may have related workflows that could benefit from location information. For example, adding new workflows may only require minor changes to your infrastructure, your training plan, or your data. In this case, the process to conduct a pilot and potentially a production rollout may be easier, enabling your organization to realize new value quickly.
- Think about everyone in your organization that might benefit from the new maps, apps, graphs, reports, and analyses that are being created. Sharing location information across an organization can break down barriers among departments and enable everyone to work with the same information. Think of this as a new line of communication and an easy way to collaborate between teams.

Provide these individuals with access to your production system. Give them training and access to operational resources. If needed, determine whether your current production system can scale to support additional people or workflows. Remember, you can control access to sensitive information while making other information available to the entire organization.

- Stay engaged with your executive and key sponsors. You will need upper-level support to continue to expand and share your location platform.

“We can now very easily pull data together, perform the analysis we need, prepare a visual story map, and share that with decision makers in minutes. This lets us focus on the process of making the business successful rather than compiling and managing data.”

Mike Ferretti
Great Harvest

Keep Thinking Spatially

We hope that this guide has provided a useful framework to you and your organization to make location information a central component of your business workflows and decision processes. Launching your location platform should have highlighted several ways that location information can add value.

- Get more out of your data by considering its location element. You can use your location platform to bring your data to life.
- If your location information is fragmented into different repositories, collaborating across teams and departments will be difficult. Use your location platform to provide a comprehensive lens into all location information so that everyone in the organization is working from the same playbook.
- Maps and location information reveal new patterns and trends that you just cannot see with traditional reports, charts, and graphics. Use these new insights to make better decisions.

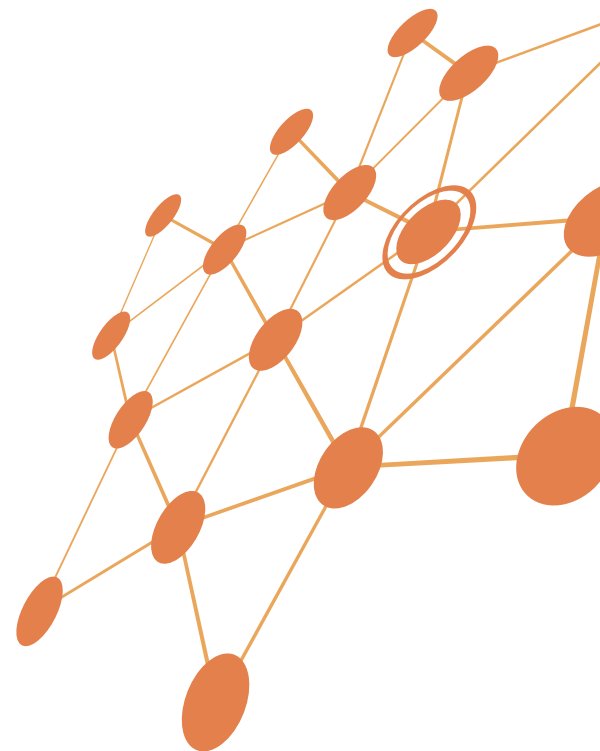
“Location is important for nearly everything we do; everywhere we make decisions—in business, in government, for how we navigate our lives. The better you use and understand location, the more effective you’ll be in your job, the better you’ll communicate with colleagues and constituencies, the better you’ll be at responding to our changing world.”

Jack Dangermond
President, Esri

As you move forward, we encourage you and everyone in your organization to think spatially whenever you face a problem. You will find that if you consider “where” first, the answers to “who,” “what,” “when,” “why,” and “how” will fall into place.

Your task now is to integrate mapping and location information into your communication with colleagues, your customers, and your business partners. Use maps to show alternatives and illustrate why decisions were made. Use maps to measure success and pinpoint areas that need help. Use maps to figure out the tough problems and to share innovative ideas.

Most of all, share your maps with colleagues in reports, presentations, mobile and web applications, and elsewhere! And when they ask, “How did you do that?” show them.



KEEP THINKING SPATIALLY

