The Most Powerful Tool In Your Belt

Implementation Considerations

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Beginning Your Implementation

Document Overview

The purpose of this document is to build on the Pre-Implementation Guide, to provide additional next steps, as well as a number of additional resources to assist you with the beginning stages of your Implementation. This document will also expand on realistic expectations regarding your project, and the scenarios which may factor into your timeline.

Implementation Consultant Introduction

Role and Expectations

Your Implementation Consultant has been personally selected for your project based on a set of criteria including your project goals, desired timeline, and location, to name a few. They will work closely with you throughout your implementation, assisting with managing goals and milestones for Maintenance Connection, from kick-off, to go-live.

As you begin to form your partnership with your Implementation Consultant, it will be helpful to outline some guidelines for your interaction regarding what you can expect from your IC, and what they will expect from you in return, to assist in guiding your project.

• **Communication**: As mentioned during your Welcome meeting, our ICs travel up to 80% of their time for in-person visits with their customers. As a result, there are several things which will assist them in their clear communication with you.
  
  o It may take **24-48 hours** to receive a response from your IC, depending on where they are located and the availability of technology (cell service, internet, email).
  
  o We also recommend including **all relevant information** (including contact details) in the email and/or voicemail so that your IC can more quickly respond while traveling.
  
  o With these items in mind, should you have an **urgent request**, please include your Customer Coordinator so that they may assist you.
• **Documentation:** Some customers prefer to maintain their own project documentation. However, training agendas, post-training notes, ongoing action items, and similar documents can be made available to you upon request.

• **Momentum:** Our goal is to make sure that your project is consistently moving forward. As a result, your IC will most likely propose a combination of remote and in-person training sessions to fit your needs. It is our goal that your next training session be scheduled prior to the conclusion of your current meeting or session until your project is complete, or your services balance has been used.

• **Training and Travel:** Through the sales process, you have committed to cover any travel costs associated with in-person visits. With that in mind, please take note of the following:
  
  o You will be invoiced for any actual costs related to your training.
  
  o We typically confirm 30 days in advance to secure the most affordable rates.
  
  o We follow industry standards for booking travel unless specific arrangements have been made in advance with your IC.

• **Best Practices:** Our aim is to understand your project goals, providing options and advice that best fits your needs based on our experience with similar projects. However, all key project decisions are ultimately left up to your project lead, and your IC will defer to their wishes.
There are many variables which may contribute to the timeline of your implementation. Typically, a combination of the below factors, as well as other variables will contribute to the length of your project:

- **Availability of Internal Resources**: The availability of these resources and the time they are able to devote to your project will have a direct correlation to how quickly your implementation is able to move forward.

- **Existing Data**: If your data is readily available and of good quality, your project will have a jump start. However, if the data still needs to be collected, or if a significant amount of data scrubbing needs to be performed, this will add time.

- **Number of Sites and/or Groups**: Systems targeted for use by a single group at one location tend to go faster than projects where multiple groups in different locations must be considered during configuration.

- ** Modifications**: Projects targeted for customizations to the interface, or for integrations with 3rd party software will take additional time to scope and complete. This will be factored into your implementation timeline.

- ** Allocated Services**: Limited services time will restrict the amount of assistance your Implementation Consultant can provide, which will typically increase the timeline of your project. Larger relative services balances will allow the maximum assistance to be provided so your project can be completed as quickly as possible.
A combination of the above factors will be used to determine your project scope. Below is a typical breakdown of how these factors may combine to affect project timeline.

<table>
<thead>
<tr>
<th>Project Scope:</th>
<th>Limited</th>
<th>Standard</th>
<th>Comprehensive</th>
<th>Enterprise</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Goals:</td>
<td>Minimal</td>
<td>Basic</td>
<td>Complex</td>
<td>Extensive</td>
</tr>
<tr>
<td>Existing Data:</td>
<td>Available/ Clean</td>
<td>Limited collection and/or Scrubbing required</td>
<td>Considerable collection and/or Scrubbing required</td>
<td>Widespread configuration and/or Standardization required</td>
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<tr>
<td>Site/Group:</td>
<td>Single</td>
<td>Single</td>
<td>Multi</td>
<td>Multi</td>
</tr>
<tr>
<td>Modifications:</td>
<td>None required</td>
<td>Optional</td>
<td>Required</td>
<td>Critical</td>
</tr>
<tr>
<td>Approx. Project Timeline:</td>
<td>3 – 6 Months</td>
<td>6 – 12 Months</td>
<td>9 – 18 Months</td>
<td>12 – 24 Months</td>
</tr>
</tbody>
</table>

**Pre-Implementation: Completed Steps**

*Completed Steps for Implementation*

At this point in your project, we will assume that you have completed the below action items during the Pre-Implementation phase. If you have yet to complete any of these items, please be sure to let your IC know, and reference your Pre-Implementation Guide to complete these important steps:

- **Collect Your Thoughts:** Completed your Pre-Implementation Questionnaire.
- **System Access:** Verified your Maintenance Connection credentials online, or completed your onsite installation.
- **Explore:** Logged in to create and approve your key members for system access.
- **Look for Shortcuts:** Gathered relevant reporting examples, process documentation, and information for data migration.
As we begin the Implementation phase of your project, your immediate action items are:

**Kickoff Meeting**
- The first step in your Implementation process is to schedule a Kickoff meeting with your IC. The goal of your Kickoff is to more clearly define your Implementation timeline, decide next steps for data migration, and begin learning your current process so system configuration can begin.

**Schedule Training**
- As mentioned in the Project Timeline section above, it is important to keep project momentum. Therefore, your next step will be to determine your training schedule using the *Training Considerations* document.

**Data Migration**
- By now you may have begun gathering relevant data for migration into MC (commonly by using the Import Template). Please reference the *Data Migration Guidelines* document as you collect your data.

**Development Needs**
- If you are considering either a Customization, or an Integration, please review our *Modification Considerations* document, compile your supporting details, and schedule time with your IC to discuss how to proceed.

**Begin Goals**
- Once you have completed the above Next Steps, you are ready to begin working with your IC toward the completion of your goals.

**Moving Forward!**
*A Successful Implementation*

Thank you for taking the time to review these project considerations. As mentioned throughout, proper planning regarding your timeline, as well as the allocation of resources will help contribute to a positive implementation. We look forward to assisting you with the next steps of your project, while building a partnership to leverage along the way.