Standard & Tailored Projects

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Our Standard and Tailored Packages can get you up and running within 8-12 weeks after meeting your Professional Services team! During the project, we will meet with you at least 10 times. Click here to find out about the meeting topics, what you can prepare before each of the meetings and any homework you have after the meeting.

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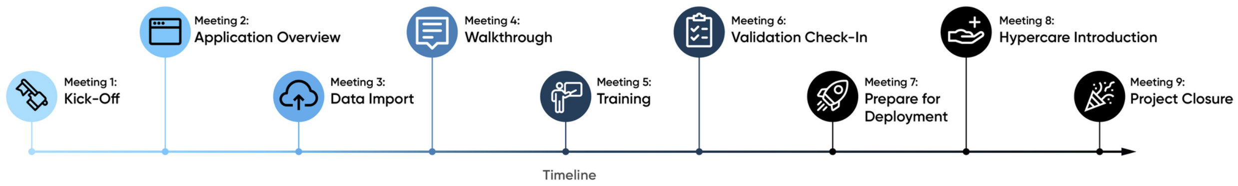

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Meeting 1: Kick-Off
Meeting 2: Application Overview
Meeting 3: Data Import
Meeting 4: Walkthrough
Meeting 5: Training
Meeting 6: Validation Check-In
Meeting 7: Prepare for Deployment
Meeting 8: Hypercare Introduction
Meeting 9: Project Closure

Meeting 1: Kick-Off

Prep

❐ **Internal Alignment**

Software is more than a few buttons to click, it represents a change, and change comes with opportunities and challenges. We recommend ensuring that the right mix of people are part of your project implementation. This can involve:

- a business subject matter expert who is familiar with the ins and outs of your process
- a user who will be in the application every day and who will administer the application on an ongoing basis. We find the best results when the user is tech saavy and/or has been an administrator of another system in the past.

- a user who may be in the application from time-to-time, this could be an executive who might be running reports quarterly or a user who updates issues quarterly.
- Depending on the complexity of the project, a dedicated project manager who will ensure your team knows when things are happening and that no timelines or homework slips.

We understand change happens but it's important to take some time to get your team chosen from day 1. This ensures your team are available and reduces any potential time spent repeating terminology or application overviews.

❒ Resolver Application Video

We are excited to start you on your Resolver journey! We have prepared a quick welcome video which will provide you with a high-level understanding of the application. Please forward this on to your project team so they too can start getting excited about our journey together.

❒ Touchpoint Set-up

We like to set up a 1-hour touch point every week throughout the project.   Please review calendars in advance so we can set up the call after the meeting.

❒ Company Logo

We like to personalize the application with your company's logo. Please click the link below to review the requirements for the logo and send the logo to your Project lead when you can.

https://help.resolver.com/help/image-upload-custom-logo

Homework

❒ Socialize Presentation

We encourage you to socialize the presentation with other team members who might be interested in the project approach and timelines. This helps align on expectations so we can proactively address any feedback.

❒ Review Project Timelines

Please review the Project Timelines and provide us feedback on any black-out dates or other priorities you have that we need to be aware of. These include vacations, holidays, board reporting dates, committee meetings, internal system freezes, or other internal system go-lives.

❒ Knowledge Base

If you are really keen to get started, here are some articles from our knowledge base that might help you along the way. The top three we recommend are:

- https://help.resolver.com/help/glossary-of-terms

- https://help.resolver.com/help/app-user-guides

Meeting 2: Application Overview

Prep

❐ **Review Glossary of Key Terms**

There are some key terms that we will speak to in the application overview meeting. Our glossary of terms will make sure we're all on the same page. If you have any questions, please don't hesitate to reach out to our team.

https://help.resolver.com/help/glossary-of-terms

Homework

❐ **Watch Video and Log in to Project Tracker**

During our meeting, we took you on a tour of our Project Tracker. Please review the following video which walks you through logging into the Project Tracker. This is the first step in using the tool.

Throughout the project we will be sending you more video's to watch which will guide you through:

- Signing off Personalization
- Logging, reviewing, and closing Validation tickets
- Signing off Validation
- Logging, reviewing, and closing Hypercare tickets
- Signing off on the overall Project
- Providing Your Feedback

❐ **Login to Sandbox**

Your account has been added to the Sandbox environment and we will send you a video of today's meeting. Please login to ensure you have access and using the video begin to familiarize yourself with the application.

Meeting 3: Data Import

Prep

❐ **Collect your Data**

As you prepare for the meeting, it will be important to have your data all in one place. We suggest taking some time now to make sure you have the latest information ready to go. This will also come in handy as we personalize the application. We want to ensure we have all the correct data points/fields available in the application.

Homework

❐ **Begin Populating Data**

As you begin populating the data import template we typically find it's easier to list the data first and then begin thinking about how it relates to each other. Don't worry, we have a few references to help you:

- Please review the recording from the meeting, which we will send once the meeting finishes.
- We have prepared an article on how to enter new data here: https://help.resolver.com/help/enter-new-object-data
- You can find guidance on how to create the relationship between the data here: https://help.resolver.com/help/enter-relationship-data
- Your Consultant is available for any follow-up calls, please don't hesitate to reach out to us if you need further assistance.

We advise, as a starting point, you spend about an hour on this and then send it back to your Consultant who will review it and provide further guidance to ensure you're on the right track.

Meeting 4: Walkthrough

Prep

❐ **Send Initial/Partial Data Import**

We find the Walkthrough Meetings most productive when we have some of your data in the application. It gives us an opportunity to have a focused discussion, share best practices and ensure we're meeting your needs.

❐ **Application Review and Feedback**

As you started walking through the application after the Overview meeting, you may have some initial thoughts on the personalization you think will be of most value to your company. You may also have general questions. Please come prepared to the Walkthrough meetings with any questions and we would love to answer them for you.

Homework

❐ **Early Validation: Looking at Resolver through the eyes of an end-user**

The secret sauce in helping achieve your goals through Resolver is getting your team members (both administrators and end-users) an easy-to-use solution. A great way to help achieve this is to get into the application and take a preliminary look at what we're personalizing so you can start validating and ask yourselves:

- What data do we want and why?
- How and who will be using this data?

- How do we make capturing data as easy as possible?
- Do we need to add guidance to help users fill in data?
- Would an end user understand what data they need to provide?
- Does the personalization solve what we are after?

❐ **Prepare for Validation**

As we wrap up our Walkthrough meetings, it will be important to start preparing for validation and getting your Testing team ready. Validation is one of the most critical factors of success in any project. This is where you start testing through the lens of the business user to ensure the application is meeting your goals set out during the kick-off meeting. This is viewed as the most time-consuming task but done right and it ensures the overall acceptance of the application. You wouldn't drive an untested car so why would you use an application that hasn't been properly tested?
Here are some items to help make sure your Validation is a success:

- We advise at least 3 end-users are involved in validating the application. If you are implementing additional applications, you may need more testers. Please feel free to talk through it with your Consultant on what we recommend for your situation.
- Although your testing team will be primarily made up of the implementation team, it’s important to include a few testers who have not been involved in the project thus far. This is a great way to get their feedback and buy-in early.
- Ensure the Testers are included in the upcoming Training Meeting.
- It is also a best practice ahead of the training to ensure you have communicated to the Testing team how the application impacts them when it’s coming and what the benefits are of the new application to their day-to-day role. We also recommend they watch the Resolver Application video so they have seen the application before they begin validation.
- It is recommended to assign a Test Lead whose role is to gather feedback from the Testers. They will ensure business-specific questions are discussed within your team and they will log any application-specific questions into the Project Tracker.
- The biggest factor for a successful Validation is time! You’ll want to make sure the testing team has dedicated time blocked in their calendars to test the application.

Meeting 5: Training

Prep

❐ **Invite Testers to Training**

Please ensure that you have forwarded the Training invite on to the Testing team. This training will be a walk through of the application and your process from start to finish.

❐ **Personalization Sign Off**

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Now that we have personalized the application to meet your organizations goals and are beginning training, it is important to ensure you have signed off on the personalization within the Project Tracker.

Homework

❐ Begin Application Validation

It is now time to begin validating the application. Here are a few items to help get you started:

1. Login
2. Navigate to the application
3. Walkthrough your process from start to finish
4. Perform your day to day activities
5. Run reports for Board reporting
6. Add new users and assign them to roles
7. Walkthrough the process from all end-users perspective as well

Remember as you're opening forms and moving objects through workflows, it's important to keep these questions in mind:

- Is it easy and intuitive to log information?
- Have we provided guidance to help facilitate users in entering information?
- If a user was in the application on a limited basis, is it clear what is expected from them?

❐ Library Data Validation

As you're thinking about the user experience and validating the application, we also ask that you confirm the data we've imported. Is there anything missing? Is it accurate? This will become the data we import into your production environment so it's crucial to review it and ensure it is accurate and complete.

❐ Log Validation Tickets

Remember to log any questions, clarifications or tweaks into the Project Tracker. Once your Consultant has addressed the ticket, you will receive an email notification to review the comments or retest the ticket.

Meeting 6: Validation Check-In

Prep

❐ Review Validation Tickets

During the meeting we will talk through outstanding tickets in the Tracker. Please ensure you have reviewed all open and outstanding tickets in the tracker. Please close any tickets that have been addressed.

Homework

❒ Close Tickets

Based on our meeting, there may be some tickets that require action. Please go through and Accept, Close or provide further details in the remaining tickets. As we move into Deployment after Validation, all tickets will need to be either Accepted or Closed.

❒ Final Validation

You are now familiar with all things Resolver! It is important to continue to walk through the application from start to finish and log any high-priority tickets in the Project Tracker.

❒ Prepare for End-User Training

As we finalize the application, it is important to ensure you have booked the end-user training sessions within your organization. This may not be required for all organizations. If you are a smaller team, your whole team may have been involved in the implementation and therefore you don’t need to train any end users.

Meeting 7: Prepare for Deployment

Prep

❒ Completed Validation

As you validated the application did you answer yes to all the questions below?

- Is it easy and intuitive to log information?
- Have we provided guidance to help facilitate users in entering information?
- If a user was in the application on a limited basis, is it clear what is expected from them?
- Have we achieved the objectives outlined in the Kick-off? Has the application solved the problem we were facing?

❒ Validation Sign Off

Before we begin deploying the application in Production, we will want to ensure you have Accepted or Closed all Validation tickets and Signed off on the Validation phase in the Project Tracker.

❒ Internal Communication

We recommend proactively communicating with your team that you’re ready to roll.

Homework

❒ Launch Day!

We have just agreed on our Launch day. We ask that you block the day and time off in your calendar. We will want to ensure you can access Production and can help validate the data.

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Meeting 8: Hypercare Introduction

Prep

❐ **Login to Production**

Please login to production and ensure you have access to the application and you can see the admin cog at the top right granting you administration access.

❐ **Confirm End User Accounts**

Click on the admin cog wheel at the top right and navigate to the Users list. Please scroll through the list to ensure all end users who require access to the application have been added here and are enabled. Click on each user to confirm they have been granted the correct access to their role.

❐ **Confirm Library Data**

Once you have logged in, click on the left hand menu and select Library. You'll want to ensure the correct data has been imported from the data import template.

Homework

❐ **Review Presentation**

Please ensure you have reviewed the important information included in the Hypercare presentation including the key dates when the Hypercare period is completed and you are familiar with the scenarios that might pop up over the duration of Hypercare and who you need to contact for each scenario.

❐ **Log Hypercare Tickets**

As you begin using the application to complete your day-to-day activities, please log any questions, clarifications, or issues you might be having. We are here to help!

❐ **Review and Close Tickets**

Review all open and outstanding tickets in the Tracker, please Accept or Close all tickets that have been fixed or your question answered. As we move into Project Closure, we will want to ensure all tickets are either Accepted or Closed.

Meeting 9: Project Closure

Prep

❐ **Close Hypercare Tickets**

Ensure all individual Hypercare tickets are closed or accepted in the Project Tracker.

❐ **Project Completion Sign Off**

Once Hypercare is signed off, in the Project Tracker, please also Sign off on the overall Project.

❒ **Feedback**

While you are Signing off on the Project within the Project Tracker, we invite you to provide your honest feedback on what went well, and how we can improve. We'll only get better with your insights!

Homework

❒ **Celebrate!**

Cheers to all the hard work that went into completing the project. Take a load off—you deserve it!