Elite	
Description	Provider will deliver Services to implement and onboard the Elite solution.
Assumptions	Provider's standard approach to onboarding is a shared effort. The Customer's team will be expected to configure elements of the software, perform data entry work, and test workflows throughout the onboarding. This work coincides with training from the Provider's Services team. Over the course of onboarding, the Customer should expect to spend approximately 40 hours on the project for best results. If the Customer is not able to dedicate the time and/or resources at any point throughout the onboarding, additional fees may be incurred and project timelines will be impacted. The Provider will work with the Customer to complete base onboarding, configuration, and Customer team training. The training portion of this project will include recorded videos and practice that the Customer team must complete before attending live virtual instructor-led trainings each week for 60-90 minutes. All instructor-led trainings will be recorded. Process documentation will be managed by the Customer with specific software processes outlined throughout the onboarding.
Limitations	The system will be configured with the features and capabilities of the current release of the Services. It is the customer's responsibility to ensure a comprehensive understanding of capabilities and limitations during the sales process.
Kick Off	**Provider responsibility:** Internal handover, preparation, customer research Up to (1) 90-minute remote kick off / discovery meeting with preparation **Customer responsibility:** Ensure key project resources and stakeholders can attend kick off meeting Ensure project scope is accurate and fully aligns to all business requirements Raise any risks, black out periods for software release Provide an understanding of business processes, data and requirements Prior to kickoff the items below are needed. Failure to provide any times that are needed prior to kick off will delay kick off and the project. Document templates that have been approved by your leadership and legal teams (Proposal, Contract, Event Orders, Invoices, etc.); document templates should be provided via Microsoft Word Rate sheets: inclusive of rental, venue services, equipment use, and food and beverage. Members of Customer's project team Report examples Onboarding survey
Design	**Provider responsibility:** Recorded resources provided on system admin configuration, configuration of inventory and pricing, and packages and instruction sets. 90-minute Instructor-led meetings to review configuration work customer has completed and to advise on best practices for configuration. **Customer responsibility:** Review recorded training resources and complete configuration work as advised during Instructor-led meetings. Resource: Elite Foundations and Financial Foundations to complete System Admin Wizard, Resource: Inventory and Pricing and Packages and Instruction Sets to complete Inventory and Pricing build.
Build	**Provider responsibility:** Configuration of standard base templates: hold confirmations, proposals, addenda, schedules, event orders, post-event reports, invoices, receipts, credit memos, & refund confirmations Standard base template examples available here: https://elitesupportcenter.ungerboeck.com/hc/en-us/articles/17460981687575-Insights-Document-Template-Library Minor adjustments to the standard base templates such as adding logos, modifying fonts, font sizes, and color. Budget intensive customizations are out of scope. Configuration of up to five (5) custom document templates **Customer responsibility:** Review completed document templates, reports and dashboards with core project team and any internal stakeholders in a timely manner Provide feedback to Provider for adjustments or questions.
Training	**Provider responsibility:** Up to five (5) 90-minute remote training sessions delivered, sessions will be recorded Training on core system to be completed within six (6) weeks once initial build and configuration is complete **Customer responsibility:** Ensure appropriate users are selected and attend all training sessions and complete all prep work and follow-up work prior to and following trainings All users will be expected to complete the designed curriculum shared via Kantata and available within the Elite Knowledge Base
Testing	**Provider responsibility:** Up to one (1) 60-minute remote meeting to introduce an example User Testing test plan and the process to raise issues **Customer responsibility:** Perform user acceptance testing Ensure key resources attend all user acceptance testing review meetings Raise any issues found (that are within the scope of work) with Provider to be reviewed via email or in a testing follow-up call Complete two (2) "Dress Rehearsals" following our best practices guideline article provided by Provider
Launch & Post Launch	**Provider responsibility:** Up to one (1) 60-minute remote meeting for go-live including wrapping up project, recommendation of next steps, connection to Support, and review of important enhancement requests **Customer responsibility:** Ensure key resources attend all post launch review meetings and schedule additional user-training with venue teams Complete a full account review and audit (users and roles, calendar and list views, report and dashboard sharing) Complete internal standard operating procedures documentation, determine a plan for upkeep and sharing with new hires Raise any issues found (that are within the scope of work) Sign off on project acceptance Complete customer satisfaction survey
Project Management	**Provider responsibility:** Creation and maintenance of project plan Coordination of resources, activities, and scheduled meetings in alignment with timelines and milestones Review of project timelines, budgets, and risks to schedule **Customer responsibility:** Nominated project lead who is empowered to make decisions, call meetings, and document new standard operating procedures for the venue teams Recommended that Customer team meets at least once weekly prior to or following weekly meetings with Provider to align internally and delegate configuration responsibilities Coordination of activity and resources on customer side to align to project plan and schedule
Exclusions	Custom template/report/dashboard creation or customisation of library templates over and above what has been outlined in scope. Custom development unless specified above Integration services not specifically defined in the scope above
Length of project: 12 weeks from kick off to project closure	
Note: This is an estimate and is dependent on Customer cooperation, timely responses and availability of necessary resources.	