

Accounts Receivable (Elite) Onboarding	
Description	<p>Momentum Technologies' standard approach to onboarding is a shared effort. The Client'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 Consulting Services team. Over the course of onboarding, the Client should expect to spend approximately 20 hours on the project for best results. If the Client is not able to dedicate the time needed at any point throughout the onboarding, project timelines and the scope of work will be impacted.</p> <p>Momentum Technologies will work with the Client to complete base onboarding, configuration, and Client team training. The training portion of this project will include recorded videos and practice that the Client team must complete before attending live virtual Consultant-led trainings each week for 90 minutes.</p> <p>Onboarding projects last 6 weeks, not including data conversions, integrations, or other technical work streams.</p>
Assumptions	<p>Project lead and core project team are available for weekly training sessions (1-2 hours per week) AND internal self-guided practice and configuration (1-2 hours per week).</p> <p>Project lead and core project team are empowered to make decisions and document new SOPs.</p> <p>Project lead and core project team hold internal discussions on proposed workflows, provide timely feedback on deliverables, and create a formalized plan to onboard secondary users.</p>
Limitations	Not applicable for non-technical
Kick Off	<p>Momentum responsibility: Internal handover, preparation, client research 60-minute remote kick off / discovery meeting with preparation, attended by Consultant, client project lead and client project core team</p> <p>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, block out periods for software release Provide an understanding of business processes, data and requirements</p> <p>PRIOR to kickoff the following is needed:</p> <p>Rate sheets <i>or already current</i> Momentum Elite Inventory and Pricing: inclusive of rental, venue services, equipment use, and food and beverage. Members of Client's project team Report examples including GL import for your respective financial system</p>
Discovery	<p>Momentum responsibility: Included with kick off, see above</p> <p>Customer responsibility: Included with kick off, see above</p>
Design	<p>Momentum responsibility: Recorded resources provided on configuration of inventory and pricing and packages. 90-minute Consultant-led meetings to review configuration work client has completed and to advise on best practices for configuration.</p> <p>Customer responsibility: Review recorded training resources and complete configuration work as advised during Consultant-led meetings. Resource: Elite Financial Foundations and Inventory and Pricing and Packages and Instruction Sets to complete Inventory and Pricing build.</p>
Build	<p>Momentum responsibility: Consultant and Momentum team to complete build of invoice, GL export report, and adjustments to financial reports and dashboards from our Insights library.</p> <p>Customer responsibility: Review completed document templates, reports and dashboards with core project team and any internal stakeholders in a timely manner provide feedback to Consultant for adjustments or questions.</p>
Training	<p>Momentum responsibility: 7.5 hours of Consultant-led sessions and training, sessions will be recorded Training on core system to be completed within 12 weeks once initial build and configuration is complete</p> <p>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</p>
Testing	<p>Momentum responsibility: 1 x 60-minute remote meeting to introduce an example UAT test plan and the process to raise issues</p> <p>Customer responsibility: Create testing for each workflow Perform UAT against test scripts in a Ensure key resources attend all UAT review meetings Raise any issues found (that are within the scope of the SOW) with Consultant to be reviewed via email or in a testing follow-up call Complete 2 "Dress Rehearsals" following our best practices guideline article here</p>
Launch & Post Launch	<p>Momentum responsibility: Handover to support for any troubleshooting needs post go-live or adjustments to invoice, GL export, or library templates.</p> <p>Customer responsibility: Ensure key resources attend all post launch review meetings and schedule additional user-training with venue teams Complete internal SOP documentation, determine a plan for upkeep and sharing with new hires Raise any issues found (that are within the scope of the SOW) to Consultant Sign off on project acceptance Complete CSAT survey</p>
Project Management	<p>Momentum 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</p> <p>Customer responsibility: Nominated project lead who is empowered to make decisions, call meetings, and document new SOPs for the venue teams Recommended that customer team meets at least 1x weekly prior to or following weekly meetings with their Consultant to align internally and delegate configuration responsibilities Coordination of activity and resources on customer side to align to project plan and schedule</p>
Exclusions	<p>Meetings, testing and launch support outside of core working hours Implementation packages do not include ongoing account management, additional optimisation activities, performance management Onsite visits unless specified above Custom development unless specified above Integration services not specifically shared in the scope above Once the design documentation is signed off by the customer, any further requirements are considered to be out of scope</p>
<p>Length of project: 6 weeks from kick off to project closure</p> <p>Note: This is an estimate and is dependent on Customer cooperation, timely responses and availability of necessary resources. ☒</p>	