

Momentum for Higher Education (Core Elite Software) with Accounts Receivable	
Description	<p>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 Consulting Services team. Over the course of onboarding, the Customer should expect to spend approximately 45 hours on the project for best results. If the Customer 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>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 Consultant-led trainings each week for 60-90 minutes.</p> <p>Onboarding projects last 14 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 standard operating procedures.</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
Kick Off	<p>Provider responsibility: Internal handover, preparation, customer research Up to (1) 90-minute remote kick off / discovery meeting with preparation</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, black out periods for software release Provide an understanding of business processes, data and requirements</p> <p>PRIOR to kickoff the following is needed: 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</p>
Discovery	<p>Provider responsibility: Included with kick off, see above</p> <p>Customer responsibility: Included with kick off, see above</p>
Design	<p>Provider responsibility: Recorded resources provided on system admin configuration, configuration of inventory and pricing, and packages and instruction sets. 90-minute Consultant-led meetings to review configuration work customer 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 Foundations and Financial Foundations to complete System Admin Wizard, Resource: Inventory and Pricing and Packages and Instruction Sets to complete Inventory and Pricing build.</p>
Build	<p>Provider responsibility: Consultant to complete build of document templates (proposal, contracts, addendum, event orders, banquet event orders, hold confirmation, invoice, post show report) and adjustments to reports and dashboards from our Insights library. Minor adjustments to base templates found within our Knowledgebase in the Template and Report and Dashboard Libraries will be made.</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>Provider responsibility: Up to seven (7) 90-minute remote training sessions delivered, sessions will be recorded Training on core system to be completed within eight (8) 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>Provider responsibility: Up to one (1) 60-minute remote meeting to introduce an example User Testing test plan and the process to raise issues</p> <p>Customer responsibility: Perform UAT against test scripts Ensure key resources attend all user acceptance testing review meetings Raise any issues found (that are within the scope of the Statement of Work) with Consultant 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</p>
Launch & Post Launch	<p>Provider responsibility: Depending on project budget and what has been utilized for templates and insights, there may be additional room to host Consultant-led additional user trainings (usually for teams that will be view-only in the system). If budget has been used elsewhere, venue team to schedule and host these sessions and follow-up with Consultant on any go-live issues that arise Within this phase is also Account Fine-Tuning (review of user role permissions, saved views, and report and dashboard sharing). 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</p> <p>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 the Statement of Work) Sign off on project acceptance Complete customer satisfaction survey</p>
Project Management	<p>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</p> <p>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 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>Custom development unless specified above</p> <p>Integration services not specifically defined in the scope above</p>
Length of project: 14 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.	