

Additional Higher Ed Business Unit Onboarding	
Description	Customer has been onboarded with one or more business units and is now adding an additional business unit to the software.
Assumptions	<p>Provider at least one business unit using the software</p> <p>New Business Unit will be onboarded in same Organization</p> <p>No custom work is required</p> <p>Inegrations are not included</p> <p>A Train-the-Trainer approach will be taken</p>
Limitations	Not applicable
Kick Off	<p>Provider responsibility:</p> <p>Internal handover and preparation</p> <p>Prepare for and hold a remote kick off meeting</p> <p>Customer responsibility:</p> <p>Ensure key project resources and stakeholders attend kick off meeting</p> <p>Ensure project scope is accurate and fully aligns to all business requirements</p> <p>Raise any risks, black out periods for software release and resourcing plan</p>
Discovery	<p>Provider responsibility:</p> <p>Up to six 1-hour remote requirements gathering meetings with preparation and write up covering the 6 workflows listed below</p> <p>LTO - Lead to Opportunity (all elements of Customer Relationship Management as well as managing the sales cycle from first contact to a prospective inquiry)</p> <p>ETO - Event to Order (all steps from the concrete sales inquiry to placing an order and contracting the details)</p> <p>OTD - Operations to Delivery (ensures the smooth planning, execution and delivery of event logistics upfront and during the event)</p> <p>ITC - Invoice to Cash (all elements that are related to debtor management, invoicing a customer and managing payment receipts)</p> <p>ITE - Inventory to Event (covers the stock and availability management for event inventory as well as releasing stock for event operation)</p> <p>RTR - Record to Report (covers all functionality with regards to financial and/or operational reporting)</p> <p>Customer responsibility:</p> <p>Ensure key resources attend all discovery sessions</p> <p>Provide an understanding of business processes, data and requirements</p>
Design	<p>Provider responsibility:</p> <p>Configure a proof of concept based on the requirements gathered in the discovery meetings</p> <p>Prepare for and hold a 90 minute demo session for Customer</p> <p>Customer responsibility:</p> <p>Ensure key project resources and stakeholders attend the demonstration</p> <p>Provide feedback on the demonstrated processes in the new software</p>
Build	<p>Provider responsibility:</p> <p>Space and Recourse Import using Import Tool</p> <p>Configure master tables</p> <p>Configure up to 1 Price Lists and up to 40 Items</p> <p>Create up to 1 Activity Checklist CRM level</p> <p>Set up of new users, roles and access management</p> <p>Setting up views/dashboards per location in region</p>
Training	<p>Provider responsibility:</p> <p>Up to three 1-hour remote end user training sessions for the new business unit</p> <p>Training is scheduled to be completed in 1 week</p> <p>Customer responsibility:</p> <p>Ensure appropriate users are selected and attend all training sessions</p> <p>All users will be expected to complete the designed curriculum in the Provider's Learning Center</p>
Testing	<p>Provider responsibility:</p> <p>A 30min remote meeting to introduce an example test plan and the process to raise issues</p> <p>Up to two 30mins remote meetings to review and resolve any issues, with follow up</p> <p>Provider will maintain issue log to track status and progress of issues raised.</p> <p>Customer responsibility:</p> <p>Customer is responsible for preparing for and executing user testing, including creation of test plans, test cases, and test scripts.</p> <p>Ensure key resources attend all testing meetings</p> <p>Raise any issues found (that are within the scope of the SOW) via the issue log</p> <p>The testing phase will be no more than 2 weeks in duration</p>
Launch & Post Launch	<p>Provider responsibility:</p> <p>Up to two 30min post launch support meetings as required</p> <p>Internal handover to support functions</p> <p>Customer responsibility:</p> <p>Ensure key resources attend all post launch support review meetings</p> <p>Complete Customer Satisfaction survey</p> <p>Post Launch activities will be completed in 2 week</p>
Project Management	<p>Provider responsibility:</p> <p>Weekly 30 minute project review meeting through launch</p> <p>Creation and maintenance of project plan</p> <p>Weekly project status report to be sent out detailing progress, budget review, issues/risks, next steps</p> <p>Coordination of resources, activities, meetings in alignment with timelines and milestones</p> <p>Ownership of issues log and delegation of tasks</p> <p>Customer responsibility:</p> <p>Nominated project lead</p> <p>Ensure key resources attend all weekly project review meetings to provide updates</p> <p>Coordination of activity and resources on customer side to align to project plan and schedule</p>
Exclusions	<p>Custom development is not included in the scope of this Service</p> <p>Integration services are not included in the scope of this Service</p> <p>Once the build phase begins, any further requirements are considered to be out of scope</p>
Estimated length of project: 6 weeks	
Note: This is an estimate and is dependent on Customer cooperation, timely responses and availability of necessary resources.	