

Business Process Optimization Workshop	
Description	Provider will analyze the effectiveness of the current workflows and Customer challenges and will provide short term and long term recommendations. In addition, this scope of work includes up to 40 hours of configuration and training activities based on Customer selected priorities from the recommendation report.
Assumptions	<p>Provider Enterprise software is already in use at Customer</p> <p>In order to ensure full success of the optimization approach, Customer will commit to:</p> <ul style="list-style-type: none"> (a) Facilitate the upgrade of the Enterprise software to the latest available version via a request on the online portal. (b) Ensure availability of the required team members for each phase of the project (c) Replace any required team members on the project in case one or several team members are unavailable. Ideally, backups for the key users are identified and involved in the project. (d) Provide all the required documentation (processes, workflows, etc) and technical information that is required for the completion of the project. (e) Customer's IT team supports the project as required
Kick Off	<p>Provider responsibility: Internal handover and preparation Prepare for and hold a remote kickoff meeting to align project plan and milestones between involved parties</p> <p>Customer responsibility: Ensure key project resources and stakeholders 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 and resourcing plan</p>
Process Evaluation	<p>Provider will be onsite for 3 to 4 days to review and analyze each department's internal workflow and the effectiveness of cross-departmental activities. Note: Each key user is only required to attend the sessions relevant to their own processes.</p> <p>Provider will review and analyzes each department's internal workflow and the effectiveness of cross-departmental activities.</p> <ul style="list-style-type: none"> Consultant will observe and discuss the work processes with the key users from each team Consultant will identify various opportunities that are low effort in addition to process improvements Consultant will also suggest new software features that should be utilized <p>Customer responsibility: Ensure key resources can attend appropriate meetings/sessions. Provide an understanding of current state business processes, data and challenges.</p>
BPO Report	<p>Following the onsite meetings, Provider will document recommendations for the changes that should be made by Customer.</p> <p>Business Process Optimization (BPO) Report includes:</p> <ul style="list-style-type: none"> Business process recommendations overview Business process recommendations by team Short/Medium/Long-term deployment changes <p>One 90 minute remote meeting presenting BPO report to Customer project team</p>
Build	<p>Provider will implement up to 40 hours of the recommendations from the BPO report, including training for the users on the changes made. These change can be consulting changes or technical customizations based on the Customer's priorities and budget allowance. If additional hours are needed, a change order will be needed.</p> <p>Customer responsibility: Nominate Key users (ideally one per dept) who may receive early, advanced feature training to ensure that key users can answer other users' questions during and after the end-user training.</p>
Training	Not applicable
Testing	Not applicable
Launch & Post Launch	Not applicable
Project Management	<p>Provider responsibility: Weekly 30mins project review meeting for a period of 8 weeks Creation and maintenance of project plan</p> <p>Customer responsibility: Nominated project lead Ensure key resources attend all weekly project review meetings to provide updates Coordination of activity and resources on Customer side to align to project plan and schedule</p>
Exclusions	<p>More than 40 hours of configuration/technical changes and training will need a change order Additional modules that are not contracted at the time of the documentation creation. Where new modules are recommended as part of optimization, services setup fees will be indicated.</p>
<p>Estimated length of project: 6 weeks</p> <p>Note: This is an estimate and is dependent on Customer cooperation, timely responses and availability of necessary resources.</p>	