Implementation Methodology

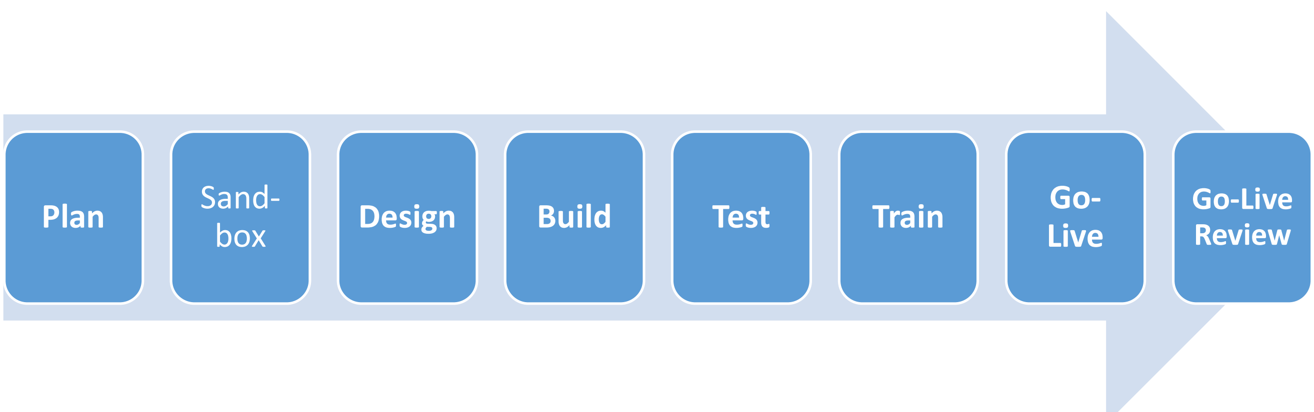
APPROACH

Our methodology is based upon over 30 years of implementing ERP finance solutions.

Following best practises, our goal is to maximise your realisation of business benefits whilst minimising the disruption to your business.

We do this by optimising the efficiency of moving your data, enabling rapid configuration to reflect your needs and processes, training your staff using your data and providing powerful analytics tools to enable you to understand your business.

PROCESS



OVERVIEW

Sales Handover

The sales team formally handover to the iplicit project team, supported by their document which captures the Customer high-level requirements identified during the sales process.

Plan

The first item is the Project Kick-off (PKO). The primary objective of the PKO is to define the draft Project Initiation Document (PID). The PID is the opportunity for the Project Manager and Customer team to define the project structure and governance, timeframes and planned deliverables.

The implementation team will be introduced including both iplicit and customer resource. The responsibilities and involvement of all the team will be agreed.

The PID covers all aspects of iplicit and reviews the customer needs & planned iplicit usage as well as delving into specific customer requirements such as interfaces, custom data, data migration, reporting, training & authorisation.

The outcome of this session is a draft PID which is shared with the customer and will be signed off by the Customer as part of the process.

Sandbox

Where possible, the customer will provide basic setup data to enable a more contextualised sandbox to be created. This subset of Customer data includes Legal Entities & Bank accounts, Chart of Accounts & hierarchy, Customers & Suppliers but not document transactions.

Using the above data and the known deliverables from the PID, the sandbox will be configured to provide initial project team training using Customer data. Early hands-on access to iplicit with Customer data is proven to increase the effectiveness of the training and the visualisation by the customer of iplicit itself as well as supporting more informed decisions to be made and awareness of options available to them at an early stage.

Examples including the sandbox being used for workshops where this assists Customer guidance how to identify which posting attributes are required, whether special accounting treatment / behaviour should be configured and when & how authorisation could be used.

Design & Build

During the course of the implementation, the sandbox will continue to be configured to represent the customer needs and decision making. As the project progresses, the sandbox build will more closely reflect the intended go-live setup.

The project team will continually configure and test this build to ensure it works according to expectation. This includes users & user permissions, communications, reports, enquiries, workflow, interfaces.

Changes to the build will be made in response to findings and any Customer decision making revisions.

During this phase, training needs, User Acceptance Test (UAT) requirements and sign-off measures (*e.g. proven data balances, segregation of duties, access permissions, testing sign-off*) will also be identified for use in subsequent stages of the implementation.

Data migration will be also conducted and tested to ensure its integrity and that the data satisfies go-live needs.

Customer documentation, training and communication plans will also be developed.

Where appropriate, a "Vanilla Reset" process will be frequently invoked to strip out data (e.g. documents, suppliers, products, workflow) and setup (as required). This enables the rapid repetition of testing and the "peace of mind" that the build is maintained and representative of go-live expectations.

Unit testing will be continuously conducted by the project team during the build phase and findings fed back into the build and / or identified in future milestones / aspirations.

TESTING

Following the build phase, formal UAT will be conducted. The scope of UAT includes migrated data, processes, reporting, communication & interactions.

UAT findings will be fed back into revised build and UAT repeated where appropriate.

UAT sign-off is a pre-requisite for go-live.

TRAIN

To maximise effectiveness and relevance, end-user training is typically targeted at job roles and will be delivered using a combination of methods including hands-on, demonstration, video & webinar.

Refresher training will typically be delivered by the customer resource but this does not preclude the use of iplicit resource.

GO-LIVE

Following successful sign-off, the project will progress to the go-live stage.

The signed-off sandbox environment will be copied to the 'go-live' environment.

Typically, elements of the data migration will be repeated as part of the go-live e.g. open debtors.

Go-live phasing will be considered where appropriate.

Legacy system access will be prevented / controlled by the Customer.

GO-LIVE SUPPORT

By arrangement, the customer will be provided with dedicated iplicit support during the initial phase of go-live. Typically, close interaction will be maintained during the initial running of key business processes.

When appropriate, customer support will be passed from the iplicit project to the support team.

POST IMPLEMENTION REVIEW

The iplicit Project team member(s) and customer stakeholders will conduct a post implementation review after successful go-live to monitor progress, review lessons learned and consider future milestones.