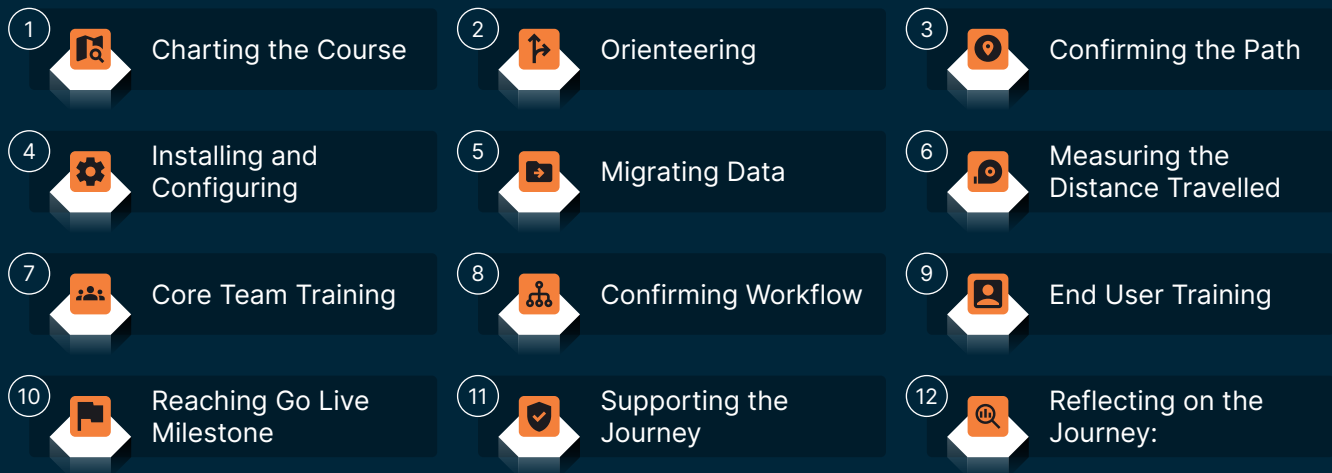




Stepping Stones Overview

Purpose: To identify and define the steps involved in the implementation process, objectives of each step, the expected output and measurements.



Stepping Stone Definitions:

1

Charting the Course:



The first step of the program focuses on key introductions, definition of operating practices and most importantly confirmation as to why the group is doing the project.

Prior to beginning the session, executive members will be required to complete the Road Map Survey to establish a base line for discussion and finalizing the project objectives.

The results of the Road Map Survey will serve as key reference point throughout the course of the project. At each milestone the team will reflect on the work completed and confirm that it supports the goals defined in the survey.

2

Orienteering:



The Orienteering step in the program is critical to ensure the team has a clear understanding at the detail level the nature of the data and workflows that are currently being followed to allow a project plan to be defined in support of the Road Map Survey goals.

Prior to beginning this session, team members will be required to complete the ISAAC Survey to establish a base line measurement for which we will review progress against at key milestones.

This session will involve a detailed review of the current master tables and entry screens and a comparison to INDUSTRIOS. The output documents will support recommendations and specific actions related to the Installation and Configuration and Data Migration Stepping Stones.

3

Confirming the Path:



Using the information gathered in the Charting and Orienteering Steps, the team will prepare a project plan focused on achieving the Road Map Goals and allocating the appropriate amount of resource to specific areas based on the Orienteering Analysis.

The Road Map Survey Results and ISAAC Rating will be communicated and formalized as the benchmarks we will use to measure the progress over the course of the project.

4

Installing and Configuring:



The Installation and Configuration step in the roadmap ensures that environment is configured to support the data migration, training, workflow confirmation and go live exercises.

This session is a technical step in the process and requires key inputs from the Orienteering step in order to complete the configuration.

5

Migrating Data:



The Data Migration phase will involve the creation of supporting tables and master file records based on information gathered and discussions in the Orienteering Step of the Road Map. These records may be created manually or using import routines depending on nature of the records, amount of change to existing records and volume.

The end result of this phase is an environment ready for transaction training. A Maintenance Strategy will be defined to ensure the data is updated for changes during the parallel period. The Maintenance Strategy is designed to promote continuous exposure to the master tables and enhance the learning experience.

6

Measuring the Distance Travelled:



In the spirit of continuous improvement and monitoring progress, we will be measuring how far we have travelled and ensuring success are celebrated and gaps identified and resolved. We will also ensure that we are continuing in the direction the Road Map initially defined.

Project timelines will also be reviewed at each distance marker and updated to accommodate changes based on knowledge gained at each of the previous stages.

7

Core Team Training:



These training sessions are designed to provide the core user community with the basic knowledge to support transaction processing. The objective is to ensure a user can create, modify and delete records, navigate the various workbench query features and understand the mechanics of the parameter and routing wizard supporting reports.

The documents generated during the Orienteering sessions will be used as a basis for preparing the training plan and will be updated as required based on new information gathered during the training sessions.

8

Confirming Workflow:



Understanding the key inputs and outputs is key to a successful implementation. Workflow Confirmation is designed to ensure those responsible for activities in a particular workflow understand the triggers to start the process, activities and tasks to be completed within the system or outside the system and hand offs to the next team member or function.

The documents generated during the Orienteering session will be used as a basis for preparing the Workflow Confirmation agendas. The team will update and create documentation to support end user training and go live. These documents will provide a basis for ongoing use of the system and support for continuous improvement initiatives in the future.

9

End User Training:



During End User Training, those not previously involved in training will be introduced to the application and to the specific tasks to be performed. The specific work instructions will be the source material to these sessions and will focus solely on company specific requirements.

For companies where the team has been involved in other training sessions, this allows the team to practice or use the opportunity to cross train.

At the end of this session, the team should be confident in the procedures that will be followed at go live.

10

Reaching Go Live Milestone:



Go Live will include various activities to enter or import opening balances and related verifications to ensure completeness between the legacy system and INDUSTRIOS. A final review will be conducted against master files, application setup options and security to ensure the system is transaction ready.

The INDUSTRIOS Professional Services team will be on site to support the users in performing daily activities according to the workflows and instructions defined throughout the project.

Depending on the complexity of the implementation and size of organization, the conversion support may extend beyond the first week of cutover. Assistance with periodic reporting such as payroll and month end may require assistance outside of the initial cutover.

11

Supporting the Journey



Up until now, the Team has been planning, practicing and rehearsing. Yet, because no amount of planning can foresee every possible scenario, your Team requires extra support at Go Live. This phase consists of making INDUSTRIOS staff available on site to support your Team with questions, concerns, unforeseen situations, etc. We plan to be with you the first few days of GoLive, through to important first time events like the first month end.

12

Reflecting on the Journey:



The project began with the identification of specific goals and objectives the team wanted to achieve through the implementation of the INDUSTRIOS solution. This phase of the project is designed to review and measure the successes achieved, additional opportunities to be considered, gaps remaining and actions required to close the gaps.