What to Expect:

# The IntelliChief Implementation Process

The IntelliChief Way:

ECM Solutions Designed With YOU in Mind

We don't believe in a "one-size-fits-all" approach to automation. Instead, we utilize a comprehensive, multi-step process to forge an optimal solution for your business while working side-by-side with key decision makers in your organization.

Every automation project is unique, just ike your business. Your solutions provider needs an intimate understanding of the nuances of your business processes and time to ensure that implementation doesn't hinder your work environment. All in ll, it generally takes 16-20 weeks for a full implementation. Some projects can be completed more quickly with standard modules. Implementations that are more complex, such as those with multiple ERP systems or applications, may require more time.

As your partner during this process, we will provide you with a list of key delivery dates outlining everything you can expect during your implementation.

Our Professional Services Team will provide you with the resources and assistance you need to ensure a successful project. Even after Go-Live, we're here to help you make the most of your investment, providing everything from system reviews and health checks to scheduled upgrades and tech support.
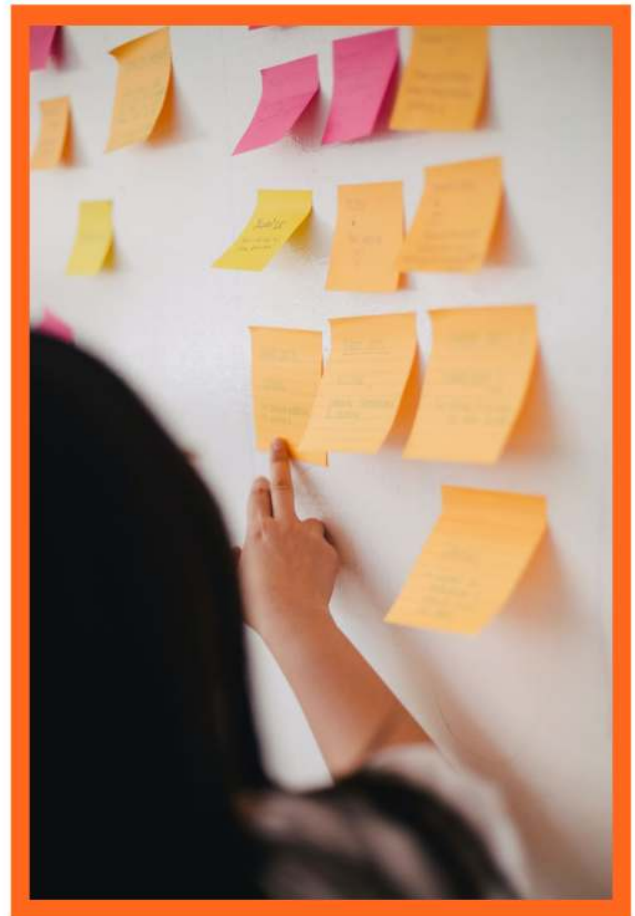
Project Readiness

Goals

- ☐ Meet Your Professional Services Project Manager
- ☐ Review Scope of Work With Key Stakeholders
- ☐ Identify Key Information for Phase Two

The Implementation Process Begins When You Sign Your Statement of Work (SOW) Document

The Virtual Kickoff Meeting will be scheduled 3-4 weeks after you sign the SOW. Your Executive Sponsor will need to be present for this call to help define the goals and objectives for your implementation. Your designated internal Project Manager will need to be present for this initial meeting as well.

Following this meeting, our team will provide you with access to our project management system, which you can use to communicate with us for the duration of the project. You can also retrieve project-related documentation from this system at any time.

You can contact your IntelliChief Project Manager with any questions that arise during this process. Your IntelliChief Project Manager will coordinate with the other members of your implementation team, including your Implementation Engineer, who will work hand-in-hand with your own internal IT team, and your Solution Analyst, who will help you define your solution and integration points.

Once we've kicked off your project, we'll host 30-minute status calls every week to discuss any necessary modifications or upgrades. Before proceeding to Phase Two, you will be asked to complete a configuration worksheet.

Phase Two:
Installation

Goals

- ☐ Succesfully Install the Most Current Version of IntelliChief
- ☐ Prepare Your IT Department
- ☐ Begin to Collect Resources for Phase Three

The Beginning of a Better Business Starts With a Successful Installation

Phase Two typically takes 2-3 weeks. We will require remote access to your business systems, databases, and servers. This lets us install our software in your environment and perform an initial analysis of your ERP data.

During this phase, we'll provide your internal IT team with a list of action items to complete. This may include enabling VPN access, setting up initial domain accounts, and various server installation tasks. Your team will also be responsible for regular back-up procedures once implementation is complete

Phase Three:
Discovery

Goals

- ☐ Meet With IntelliChief Team
- ☐ Determine Department to Automate
- ☐ Evaluate Current Processes

During Discovery, we tailor your implementation to reflect your company's unique business processes. This phase typically lasts for 3-4 weeks, during which our Professional Services team will travel to you for on-site evaluations.

Our experts will collaborate with your Functional Area Managers (the employees who currently handle the procedures you're looking to automate). These managers will walk us through their current processes, identifying the individual steps that need to be completed as well as any time-consuming inefficiencies that need to be addressed. Additionally, we will identify any occurrences within your processes that will need unique rules or exception handling. This ensures that your automated workflows move as smoothly as possible.

Phase Four:

Solution Design

Goals

- ☐ Understand the Results of Discovery
- ☐ Develop a Solution Design Document
- ☐ Final Review Before Execution

Using the information gathered during Discovery, we'll create a Solution Design Document that explains your various configuration options. We'll note our specific recommendations and the best practices that we've established for your specific use case and ERP infrastructure. Before moving on to the next phase, we'll review this document with your team and confirm that everything is accurate.

After Signing Your Solution Design Document, We Can Commence Work On Your Configuration!

Execution

Goals

- ☐ Create Workflows
- ☐ Configure User Profiles and Permissions
- ☐ Design Dashboard and Test

Generally, Execution last 4-8 weeks depending on the complexity of your Solution Design. We'll set up your document processing profiles, user profiles and inboxes, performance reports, and dashboards using your Solution Design Document as our guide.

To configure your prototype, we'll need access to your production and test environments. We'll also need sample documents for detailed testing before your solution goes live.

Once Your Solution Is Fully In Place, It's Time to Train Your Team on the IntelliChief System

Phase Six:

Training and Acceptance Testing

Goals

☐ Perform Conference Room Pilot Test

☐ Review Integration

☐ Complete IntelliChief's Comprehensive Training Program

Our Professional Services team will come to your location to present the prototype and moderate user acceptance testing. This confirms that everything is working as intended.

Once your team has officially accepted your solution, we can move forward with user training. Using a "Train the Trainer" approach, we'll teach your Functional Area Managers everything they need to know about IntelliChief. From there, they can share this knowledge with the rest of your internal team.

Optimize Efficiency and Increase ROI With IntelliChief Guiding You

Our popular training program includes training sessions in System Administration, End-to-End Processing, and all of our optional modules, like Capture Enterprise. We also offer end-user training for Functional Area Managers. Our robust program will give you all the tools you need to train new employees and get the most out of your team.

Our standard approach is to provide training in one central location. If you plan to have multiple users across various locations or shared services centers, you may want to have them travel to a single physical office for training. However, if this can't be accommodated, we can provide web-based training modules or arrange for multiple branch training sessions.

Phase Seven:

Go-Live

Goals

- ☐ Transition Core Processes to Automation
- ☐ Distribute Instructions and User Guide to Employees
- ☐ Establish Hypercare Support Plan

By this point, you'll want to have a comprehensive plan to distribute to your employees. This plan should include instructions for how to handle technical support questions.Furthermore, our team will provide you with an official Administration Guide and User Guide. For additional end-user training documentation, contact your Project Manager.

We use a Hypercare Support Model. Our Professional Services team will travel to your location to provide immediate, on-site support for any issues that arise during Go-Live. As you move toward solution independence, your internal team will gradually provide higher levels of support, ultimately allowing you to maintain your IntelliChief system with minimal reliance on our Technical Support staff.

While the actual process of activating your solution is completed in a single day we may need several days to complete pre- and post-go-live planning. If we need to migrate documents or data from a previous solution, we'll complete this work after you have achieved Go-Live. Once both parties agree that the implementation is complete, we'll transition you to long-term maintenance.

Phase Eight: Post-Go-Live

Transition from Hypercare Support to Maintenance Support. Now, all support questions will be directed to our technical support desk. We strive to respond to requests within one hour to help you resolve issues as quickly as possible.

Conclusion

There's no question that the software you choose has a major impact on the outcome of your automation project, but with IntelliChief, your Support Team offers an even greater value — **peace of mind.**

How Can We Help?

Our Professional Services team is one of the main reasons that our customers achieve such high levels of success. Because we invest the time and resources necessary to deliver true enterprise solutions, you can transform your business processes and achieve your most important goals.

We're also committed to developing a long-term partnership with our customers. Our support doesn't end after implementation; our team can help you continue to refine your strategy as your business grows. We can make tailored recommendations based on new acquisitions, corporate initiatives, or evolving KPIs.

Ready to get started? Contact your Account Executive today and take the first steps on the path to a successful digital transformation for your business.