

Elite Pro	
<b>Description</b>	<p>Provider's standard approach to onboarding is a shared effort. The Customer's team will be expected to configure elements of the software, perform data entry work, and test workflows throughout the onboarding. This work coincides with training from the Provider's Consulting Services team. Over the course of onboarding, the Customer should expect to spend approximately 25-30 hours on the project for best results. If the Customer is not able to dedicate the time needed at any point throughout the onboarding, project timelines and the scope of work will be impacted.</p> <p>The Provider will work with the Customer to complete base onboarding, configuration, and Customer team training for a single (1) venue tenant. The training portion of this project will include recorded videos and practice that the customer team must complete before attending live virtual instructor-led trainings each week for 60-90 minutes.</p> <p>Onboarding projects last approximately 8-10 weeks, not including data conversions, integrations, or other technical work streams.</p>
<b>Assumptions</b>	<p>Project scope includes onboarding for a single (1) venue tenant with standard and custom user roles.</p> <p>Project lead and core project team are available for weekly training sessions (1-2 hours per week) AND internal self-guided practice and configuration (1-2 hours per week).</p> <p>Project lead and core project team are empowered to make decisions and document new standard operating procedures.</p> <p>Project lead and core project team hold internal discussions on proposed workflows, provide timely feedback on deliverables, and create a formalized plan to onboard secondary users.</p>
<b>Limitations</b>	Not Applicable
<b>Kick Off</b>	<p><b>Provider responsibility:</b> Internal handover, preparation, customer research Up to (1) 90-minute remote kick off / discovery meeting with preparation <a href="https://elitesupportcenter.ungerboeck.com/hc/en-us/articles/17444092133143-Standard-User-Roles">Configuring Elite Standard User Roles: https://elitesupportcenter.ungerboeck.com/hc/en-us/articles/17444092133143-Standard-User-Roles</a></p> <p><b>Customer responsibility:</b> Ensure key project resources and stakeholders can 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 Provide an understanding of business processes, data and requirements</p> <p>PRIOR to kickoff the following is needed: Document templates that have been approved by your leadership and legal teams (Proposal &amp; Contracts.); document templates should be provided via Microsoft Word Rate sheets: inclusive of rental, venue services, and equipment. Members of customer's project team Report examples Onboarding survey</p>
<b>Discovery</b>	<p><b>Provider responsibility:</b> Included with kick off, see above</p> <p><b>Customer responsibility:</b> Included with kick off, see above</p>
<b>Design</b>	<p><b>Provider responsibility:</b> Recorded resources provided on system admin configuration, configuration of inventory and pricing, including room rental and item/equipment build. One (1) 60-minute instructor-led System Admin configuration remote training call and one (1) 90-minute instructor-led Inventory and Pricing remote training</p> <p><b>Customer responsibility:</b> Review recorded training resources and complete configuration work as advised during instructor-led meetings. Resource: Elite Foundations to complete System Admin Wizard, Resource: Inventory and Pricing to complete Inventory and Pricing build.</p>
<b>Build</b>	<p><b>Provider responsibility:</b> Configuration of standard base templates - proposals, addendums, hold confirmations <a href="https://elitesupportcenter.ungerboeck.com/hc/en-us/articles/17460981687575-Insights-Documents-Template-Library">Standard base template examples available here: https://elitesupportcenter.ungerboeck.com/hc/en-us/articles/17460981687575-Insights-Documents-Template-Library</a> Minor adjustments to the standard base templates such as adding logos, modifying fonts, font size and color. Budget intensive customizations are out of scope. Configuration of up to three (3) custom document templates (contracts)</p> <p><b>Customer responsibility:</b> Submit and share document needs with Provider in a timely manner, including reviewing and providing feedback for adjustments and questions.</p>
<b>Training</b>	<p><b>Provider responsibility:</b> Up to three (3) 90-minute remote training sessions, sessions will be recorded Training on core system to be completed within five (5) weeks once initial build and configuration is complete</p> <p><b>Customer responsibility:</b> Ensure appropriate users are selected and attend all training sessions and complete all prep work and follow-up work prior to and following trainings All users will be expected to complete the designed curriculum shared via Kantata and available within the Elite Knowledge Base</p>
<b>Testing</b>	<p><b>Provider responsibility:</b> Up to one (1) 60-minute remote meeting to introduce an example User Testing test plan and the process to raise issues</p> <p><b>Customer responsibility:</b> Perform user testing against test scripts Ensure key resources attend all user acceptance testing review meetings Raise any issues found (that are within the scope of the Statement of Work) via email or in a testing follow-up call Complete two (2) "Dress Rehearsals" following our best practices guideline article provided by Provider</p>
<b>Launch &amp; Post Launch</b>	<p><b>Provider responsibility:</b> Up to one (1) 60-minute remote meeting for go-live including wrapping up project, recommendation of next steps, connection to Support, and review of important enhancement requests</p> <p><b>Customer responsibility:</b> Ensure key resources attend all post launch review meetings Complete a full account review and audit (users and roles, calendar and list views, report and dashboard sharing) internally Complete internal standard operating procedures documentation, determine a plan for upkeep and sharing with new hires Raise any issues found (that are within the scope of the Statement of Work) Sign off on project acceptance Complete Customer Satisfaction survey</p>
<b>Project Management</b>	<p><b>Provider responsibility:</b> Creation and maintenance of project plan Coordination of resources, activities, and scheduled meetings in alignment with timelines and milestones Review of project timelines, budgets, and risks to schedule</p> <p><b>Customer responsibility:</b> Nominated project lead who is empowered to make decisions, call meetings, and document new standard operating procedures for the venue teams Recommended that customer team meets at least 1x weekly prior to or following weekly meetings with Provider to align internally and delegate configuration responsibilities Coordination of activity and resources on customer side to align to project plan and schedule</p>
<b>Exclusions</b>	<p>Multiple venues Custom development such as customer-specific workflows, budget-intensive customizations to base templates, reports, dashboards, etc.) unless specified above Integration services</p>
Length of project: 10 weeks from kick off to project closure	
Note: This is an estimate and is dependent on Customer cooperation, timely responses and availability of necessary resources.	