



***Sample
Welcome Letter***

Using the Sample Welcome Letter

Completed by:	Professional Services Manager, FACTS Sales Representative or FACTS Implementation Consultant
Purpose:	To begin familiarizing the Customer with the FACTS Implementation Methodology. The letter introduces the local FACTS office Implementation Team, confirms the service package purchased and provides an overview of Partnership in Action. You should enclose with the letter an agenda for the Project Strategy Meeting and Customer Planning Guide.
How it is used:	This letter is provided on the Nexus so you can personalize it for your company and the customer. Sections that must be personalized are indicated by italicized text. You may want to make additional changes to tailor the letter for your needs.
When it is used:	Send to the customer during Project Definition.
Who uses it:	Local FACTS Office only
File under:	Planning/Project Definition
Last revised:	05/01
File:	Welcome Letter.exe This is a self-extracting zipped MS Word document and must be printed/viewed through MS Word. This file is located in the Software Solutions Nexus – Facts/Documentation and Education/PIA. Note: The Software Solutions Nexus is a private extranet and is available for local Facts personnel only.

Sample Welcome Letter

July 27, 1995

Mr. William E. Phillips
President
ACME Distribution
123 Main Street
Cleveland, OH 12345

Dear Mr. Phillips:

Welcome to a family of over 3,500 customers using FACTS application software. We hope your investment in FACTS will be of great value to your company.

Over the next several months, our FACTS Implementation Team will assist you with the implementation of your software. This letter is to introduce *Bob Jones*, your FACTS Implementation Consultant, confirm the service package you purchased, and provide a brief outline of the project to prepare you for our first meeting.

You purchased a service package, which includes up to *124 hours* of implementation services. The hours required for each phase of the project are based on industry averages, your company size, resources, experience, applications purchased and other technical services required. During the implementation, we will provide the following services:

<u>Implementation Phases/Steps</u>	<u>Hours Purchased</u>	<u>Hours Recommended</u>
Phase I. Planning		
Project Definition	Internal; not billed	
Project Strategy	4 hours	4 hours
Project Plan	2 hours	2 hours
+ Project Management	12 hours	12 hours
Operations Analysis	20 hours	24 hours
Phase II. Installing the System		
Modifications (if required)	To be determined (estimated separately)	
Data Conversion	To be determined (estimated separately)	
Delivery and Setup	12 hours	12 hours
Phase III. Training and Testing		
FACTS Training	50 hours	60 hours
- Project Team (6 hours)		
- System Administration (4 hours)		
- Users (40 hours)		
Readiness Assessment	8 hours	12 hours
Phase IV. After the Install		
First 30 Days	16 hours	24 hours
Ongoing Assistance	<u>0 hours</u>	<u>16 hours</u>
TOTAL:	124 hours	166 hours

Additional services *can/will* be provided for Electronic Data Conversion and Custom Modifications to be estimated separately at \$125.00 per hour. We will provide an estimate for these services before we start on them.

Throughout the project, we will track our services and report back to you weekly the number of hours used and those remaining. Any unused hours can be applied to advanced training or other post-implementation consulting. Due to many variables which can be outside our control, we cannot guarantee that the project will be completed in the purchased or recommended hours.

With all of our services, we strive to help each Customer become as independent and self-sufficient as possible. While *Bob Jones* and the rest of the FACTS Implementation Team will assist you throughout the process, the final responsibility for a successful implementation lies within your company.

Training is vital to the success of your implementation. It is the most cost-effective way to help your employees learn the system and to place them in a leadership and project management role during the implementation. Formal customer training and on-site one-on-one training is not sufficient. Your internal training and a well-documented Policy and Procedure Manual are imperative to bridge the gap between the flexibility and sophistication of FACTS and the most efficient use of FACTS by *Acme Distribution*.

Management commitment is the single most important ingredient in determining the success or failure of your implementation. Management involvement is necessary to insure that resources and time are allocated appropriately, team members are accountable for meeting project goals, open issues are resolved and to provide your staff with overall direction. The length of time the implementation takes is primarily dependent upon management involvement, the amount of internal resources your company can devote to the project and the quality of the project plan.

Our first meeting is scheduled for *Thursday, August 5, 200X at 9:00 am* at your office. In this meeting, we will define the implementation steps and tasks with goals, milestones and dates. A detailed agenda is enclosed. The agenda also includes an outline of action items you can begin working on prior to this meeting.

Also enclosed is information on the FACTS Implementation Methodology, "Partnership in Action". Please review this guide carefully before our meeting on *August 5*. It will help you become familiar with the methodology we will use for your implementation.

We are dedicated to our new partnership and look forward to working with you to insure a successful implementation. If you have any questions, please feel free to call me at *770-418-2000, x124*.

Sincerely,

William Smith
Professional Services Manager

Your FACTS Implementation Team:

Chris Thompson, President

Kerry Stanley, Sales Representative

Bob Jones, Implementation Consultant

Sarah Roberts, Technical Services Manager

encl.: Partnership in Action brochure (x copies)
Project Strategy Meeting Agenda