



***Project Review Meeting Checklist
and PIA Feedback Form***

Using the Project Review Meeting Checklist and PIA Feedback Form

Presented by:	FACTS Implementation Consultant.
Completed by:	FACTS Implementation Consultant.
Purpose:	To review the entire project with the Customer, reinforce goodwill with the Customer, prepare the Customer for transition to Technical Support, introduce SSI Customer Account Representative (CAR) position/role and obtain feedback on the PIA process.
How it is used:	Complete each activity on the checklist. Note any concerns or issues expressed. Both the Implementation Consultant and Customer representative should sign project completion acknowledgement. Request the Customer's feedback on the PIA process.
When it is used:	After the Installation
Who uses it:	Local FACTS Office Project Team and the Customer's representatives.
File under:	After the Installation
Last revised:	05/01
File:	Project Review Meeting & Feedback Form.exe

This is a self-extracting zipped MS Word document and must be printed/viewed through MS Word. This file is located at www.sofsol.com, in the Nexus, under Information Centers – Facts Technical.

Note: The Software Solutions, Inc. Nexus is a private extranet and is available for local Facts personnel only.

Project Review Meeting Checklist

- ☐ Review progress towards original goals and objectives.
- ☐ Review Open Issues List and discuss how any remaining open issues will be managed to resolution.
- ☐ Introduce the role of SSI's Customer Account Representative (CAR) and identify by name, the CAR assigned to the Customer.
- ☐ Introduce the role of Technical Support and provide phone number, email address and Internet contact information for contacting Technical Support. Briefly explain procedures for reporting problems and submitting enhancement requests.
- ☐ Explain major release and incremental release cycles.
- ☐ Share information about the quarterly educational offerings, the customer NEXUS and SSI publications, such as "Distribution Solutions", for the customer's awareness.
- ☐ Request the PIA Feedback Form be completed and returned to SSI by fax

Other:

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Project Completion Acknowledgement

Local FACTS Office:

Implementation Consultant

Title

Date

Customer:

Customer's Main Contact

Title

Date

Feedback Form

Partnership in Action - Implementation Methodology

Date: _____

Version / Release or Revision Date

You may use this form to communicate your comments, suggestions, or concerns about this documentation.

Topics for comment are as follows: comprehensiveness, accuracy, organization and usefulness.

COMMENTS:

Comprehensiveness: ☐ Excellent ☐ Good ☐ Average ☐ Below Average

Accuracy: ☐ Excellent ☐ Good ☐ Average ☐ Below Average

Organization: ☐ Excellent ☐ Good ☐ Average ☐ Below Average

Usefulness: ☐ Excellent ☐ Good ☐ Average ☐ Below Average

Additional Comments:

Thank you for your comments. We are very interested in making this methodology as effective as possible. Your feedback is earnestly evaluated and considered.

Company: _____

Address: _____

City: _____ State: _____ Zip: _____

Name: _____ Title: _____

Phone #: _____ Fax #: _____

Software Solutions reserves all rights to information you supply in any way it believes appropriate without incurring any obligation to you.

Please fax your comments to 770-418-2022, attention FACTS Professional Services.



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