



***Project Strategy
Meeting Agenda***

Using the Project Strategy Meeting Agenda

Completed by:	FACTS Implementation Consultant
Purpose:	To provide an outline of topics to discuss at the Project Strategy Meeting.
How it is used:	<p>The Customer uses the Project Strategy Meeting Agenda to prepare data and other information needed as noted in the right column — Customer Action Items.</p> <p>The FACTS Implementation Consultant uses the Project Strategy Meeting Agenda to gather information needed to develop the Project Plan as well as set realistic expectations.</p>
When it is used:	At the first meeting with the Customer
Who uses it:	FACTS Implementation Consultant and Customer
File under:	Planning/Project Strategy
Last revised:	05/01
File:	<p>Project Strategy Agenda.exe</p> <p>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.</p> <p>Note: The Software Solutions Nexus is a private extranet and is available for local Facts personnel only.</p>

Project Strategy Meeting Agenda

1. Meet key personnel

Purpose:

To meet key employees and management involved in the Implementation project

2. Tour

Purpose:

To understand where all departments are located, including the computer room, warehouse, accounting, customer service, etc. and to understand how departments interact with each other

3. Review Customer FACTSheet

Purpose:

To review information gathered in the sales cycle, including:

- Hardware/software
- Preliminary modifications

4. Customers Goals and Expectations

Purpose:

To gain a better understanding of the Customer's goals, objectives, philosophies and expectations. This information is used to provide a clear vision and a means to measure and evaluate targets stated.

5. Local FACTS Office Goals and Commitments

Purpose:

To gain a better understanding of the implementation project, as well as present the local FACTS office goals, objectives, philosophies and expectations, as it relates to:

- ✓ Customer satisfaction
- ✓ Communication
- ✓ Project management
- ✓ Software knowledge
- ✓ Timely and Accurate Customer Billing
- ✓ **Partnership for Life**

This information is used to provide a clear vision and a means to measure and evaluate the goals and objectives stated.

6. Define Project Team

Purpose:

To identify key roles for the project team

7. Develop an Education Plan

Purpose:

To begin the initial design of the expected education and training program.

9. Special Forms

Purpose:

To discuss if special forms are required

10. Data Conversion

Purpose:

To provide an overview of data conversion which includes:

- Data conversion questionnaire to assess expectations and degree of assistance
 - a. What type? (electronic or manual)
 - b. What files? (Master, Transaction or History)
- Data conversion process
 - a. Set realistic expectations

11. Generic Implementation Plan template

Purpose:

An implementation project plan is tailored to the goals and objectives stated at the Project Strategy meeting. A generic plan is reviewed, updated and refined with tasks required.

12. Schedule Operations Analysis Survey Meeting(s)

Purpose:

The Operations Analysis Survey is a critical step in the Implementation Methodology. This step is required to understand how the Customer's business environment currently operates. This information is used throughout all phases of the implementation project.