



Checkpoint #1

Phase 1: Planning

Using the Checkpoint #1 Phase 1: Planning

Completed by:	Customer and FACTS Implementation Consultant
Purpose:	<p>To review status of the Implementation Project through the Planning Phase and determine additional action required to accomplish goals of Planning Phase.</p> <p>The Planning Phase serves as the foundation for the rest of the implementation project. The time invested here will save time later. There are four steps in the Planning Phase.</p> <ul style="list-style-type: none">> In Project Definition, the Facts Sales Representative transfers information gathered during the Sales process to the Local Facts Office Implementation Team.> The Project Strategy Meeting sets realistic expectations for the project, including project goals, objectives, scope, and time frames.> During the Project Plan step, a detailed work plan is developed with all project tasks, associated resources, time frames, and milestones.> Operations Analysis provides the Project Team with a concise, detailed analysis of the Customer's current operations and business practices.
How it is used:	This form is completed by the Customer and Local Facts Implementation Team to assess the progress on the project through the Planning Phase.
When it is used:	Complete at the end of the Planning Phase.
Who uses it:	Local FACTS Office and Customer
File under:	Planning/Checkpoint #1
Last revised:	05/01
File:	<p>Checkpoint #1 Feedback Form.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>

Partnership in Action

Checkpoint #1- Planning Phase

(Customer Comments)

This checkpoint offers the Customer and local FACTS office the opportunity to review all steps accomplished in this phase of the implementation, review all action items for each step to ensure they are completed satisfactorily, and examine areas where adjustments must be made as well as areas that need improvement. You should also determine if any open action items or issues must be resolved in order to progress to the next phase. Please communicate your comments, suggestions or concerns for each step in this phase.

STEP:

Project Definition—The purpose of this step is to transfer information gathered in the sales process from the FACTS Sales Representative to the FACTS Implementation Team. This information is used to understand the customer's business as well as prepare for the Project Strategy meeting with the customer.

Project Strategy—The purpose of this step is to meet the Customer to kick off the project. Information is gathered and expectations are set. Objectives, scope, resources, constraints and timeframes are mutually established. Information gathered in this step is used to develop a detailed Project Plan.

Project Plan—A detailed, organized project plan is developed and mutually defined based on information gathered from the Project Strategy meeting. This plan is a baseline used throughout the implementation project and is updated to reflect changes in resources, dates, and milestones.

Operations Analysis—This step provides the entire Project Team with a concise, detailed analysis of the Customer's current operations and business practices. It consists of an in-depth survey with representatives (key users and department managers) from functional areas within your company. This information is used to customize FACTS to your business environment.

Partnership in Action
Checkpoint #1- Planning Phase
(Customer Comments)

STEP:

Other Comments:

Customer Name: _____

Date: _____

Name: _____

Title: _____

Partnership in Action

Checkpoint #1- Planning Phase

(Local FACTS Office Comments)

This checkpoint offers the Customer and local FACTS office the opportunity to review all steps accomplished in this phase of the implementation, review all action items for each step to ensure they are completed satisfactorily, and examine areas where adjustments must be made as well as areas that need improvement. You should determine if any open action items or issues must be resolved in order to progress to the next phase. Please communicate your comments, suggestions or concerns for each step in this phase.

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Partnership in Action

**Checkpoint #1- Planning Phase
(Local FACTS Office Comments)**

STEP:

Other Comments:

Facts Office: _____

Date: _____

Name: _____

Title: _____

Printer Configuration Worksheet

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Facts Office:

Date: _____

Name: _____

Title: _____