



***Local FACTS Office  
Goals and Commitments  
Worksheet***

## Using the Local FACTS Office Goals and Commitments Worksheet

<b>Completed by:</b>	FACTS Implementation Consultant
<b>Purpose:</b>	To set realistic expectations for the project by communicating specific commitments to the Customer. You review and discuss these commitments in the Project Strategy meeting.
<b>How it is used:</b>	This sample gives you an idea of the type of commitments that should be made to the Customer.
<b>When it is used:</b>	It should be developed by the local FACTS office Management Team and discussed in the Project Strategy meeting.
<b>Who uses it:</b>	Local FACTS Office
<b>File under:</b>	Planning/Project Strategy
<b>Last revised:</b>	05/01
<b>File:</b>	<p>Local Office Goals Commitments.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>

## Goals and Commitments Worksheet

### Customer Satisfaction:

- Establish realistic expectations for the project scope and time frames
- Throughout the project provide checkpoints to examine what has been accomplished, what adjustments must be made and where we can improve our processes
- Conduct a post-implementation review to determine achievements of project objectives and document open issues of areas where we can improve
- Develop a strong working relationship to support our Partnership for Life program
- Other:

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### Communication:

- Send an agenda and list of action items to the Customer prior to each meeting to make the most effective use of both our time and yours
- Communicate the status of the implementation to the Customer on a regular basis
- Communicate the status of the implementation internally to our Project Team and management
- Keep Customer apprised of new products, services, and software releases
- Other:

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### Project Management:

- Provide an organized, formal Project Plan with resources, timeframes, priorities, and specific tasks that are mutually agreed upon at the onset of the project
- Complete activities on schedule as committed to the Customer
- Meet regularly with your Project Team and executive management to review the project status
- Inform all team members when any aspect of the project is not progressing as scheduled, so adjustments can be made as necessary
- Follow-up in a timely fashion on problem resolution and questions being researched
- Determine live dates based on actual readiness of all parties, rather than a pre-defined completion date
- Provide accurate estimates of software modifications and data conversion
- Other:

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### Industry and Software Knowledge:

- Provide competent advice on industry, product, technical, and business issues and procedures, based on proven results with other Customers
- Keep current on all new releases of software available
- Assist the Customer in understanding how and why problems occur and how to avoid them in the future
- Other:

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