PLAYBOOK

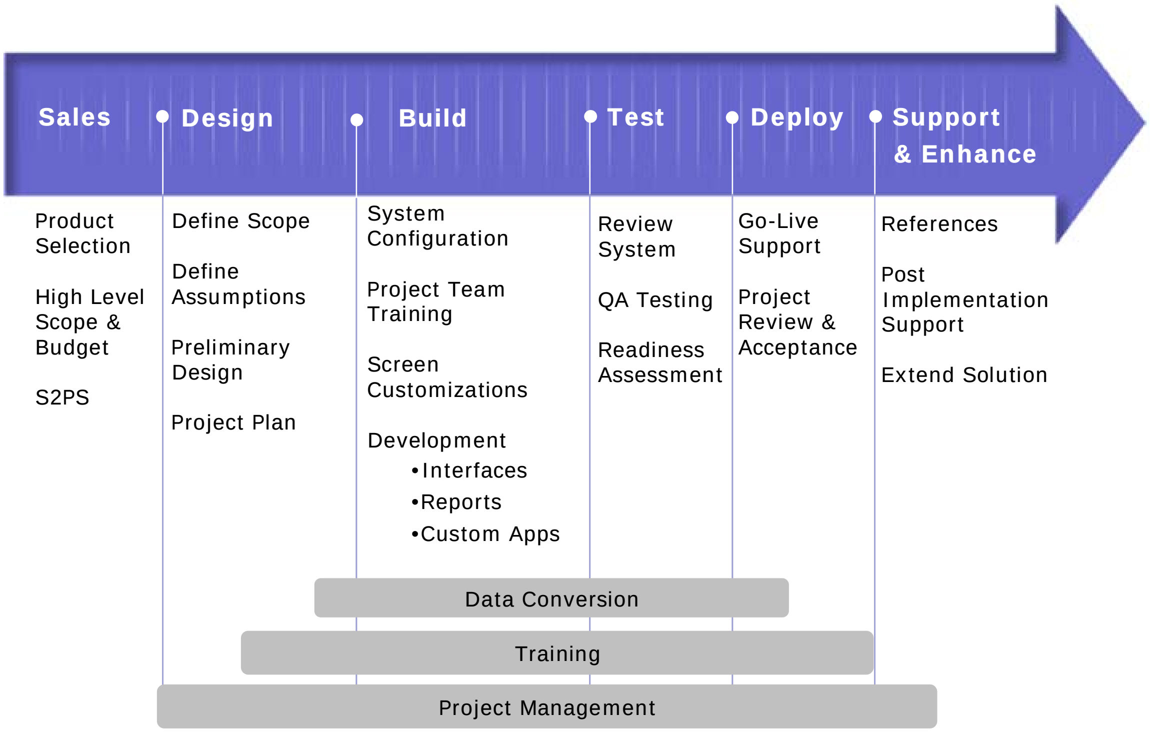
inscio

Our approach includes understanding the system design from workflow to how data is stored. Because of our complete approach, we are able to assist clients improving business processes, streamlining and automating data input and delivering the exact management data that is required.

Using our proven process for implementing Microsoft Dynamics, we are able to consistently deliver projects on time and under budget.

The following pages provide a narrative for our basic implementation methodology. This methodology is the standard for Inscio's back office, front office and development implementations, but it does not preclude additional procedures, documentation or other methodology elements that have proven successful.

The figure below is a visual representation of our process.



We categorize each of our implementation tasks into one of the following five areas:

- Design
- Build
- Test
- Train
- Deploy

To help ensure successful implementations, we include certain steps in our sales process before the implementation process begins. We have a sales process step in which we refine our recommended solution with our prospective customer and when necessary our professional services group may get involved in this step of the sales cycle to ensure solution viability and perform software demonstrations. In addition, professional services group is always involved to approve any service estimates that are presented to a prospect.

When a customer chooses to go forward with Inscio, sales delivers an internal document to the professional services group. We call this document the S2PS (Sales to Professional Services), and it outlines key information obtained throughout the sales cycle including contacts, high-level objectives and goals, assumptions, and red flags. Red flags are items that consultants need to be aware of and could impact the project if they are not properly managed. (i.e. Betty in payables is leaving in a month, etc.)

Once sales delivers the S2PS, a project manager contacts the client and initiates the Design Phase.

Design

During Design, our intent is to define the scope of the engagement, design the specifications of the solution and plan the allocation of resources needed to deliver the solution. Proper defining, planning and designing as well as obtaining client sign-off on the same are some of the most important steps for a successful implementation.

The tangible deliverables from Design are Service Order #1, Service Order #2 and the Project Plan.

Service Orders are our way to administrate specific projects that are performed for our customers. Typically our Service Orders define scope, assign service rates, provide estimates and detail customer obligations related to a specific project. Each project will have two primary Service Orders to ensure good management and control.

Service Order #1

The specific purpose of S.O. # 1 is to provide the customer with a cost estimate for Inscio to complete the Design work.

After receipt of a signed Service Order #1, the project manager will set up a planning meeting (or meetings) with the customer’s project team. The purpose of this meeting is to discuss elements required to prepare the Service Order #2 and the Project Plan, including items such as identifying roles and authorities, and confirming high-level scope and approach.

Following the planning meeting, detail design meetings will be conducted with members of the customer’s project team. The purpose of the detail design meetings is to design the specifications and delivery requirements of the solution.

An authorized customer signature is required to execute this document and perform the related services.

Service Order #2

Service Order #2 is prepared based on the findings in the detail design meetings. This is where Inscio and the Customer formally agree on scope, service rates, project estimates and detailed customer obligations related to this specific project. An authorized customer signature is required to execute this document and perform the related services.

The purpose of S.O. # 2:

- Describe the services to be performed, including specifications and configuration choices required to facilitate the desired solution. This may be organized by module or custom developed element and/or can be a series of process specific design solutions.
- To provide a cost estimate to complete the implementation, setting budgetary expectations and giving the customer and Inscio a basis to manage the costs of the project.
- Define the scope as identified in the planning and design meetings. The goal here is to understand assumptions, expectations, who is responsible for which major pieces of the project and what work is to be included.
- Identify roles to establish leadership positions on both the client team and the Inscio team. This should specifically include who needs to sign off on Service Orders, Change Orders and Project Escalation Documents.

Note that additional Service Orders of Change Orders can be added to cover additions to scope as the project progresses.

Project Plan

The Project Plan is delivered along with Service Order #2. This document is generally a Microsoft Project Plan or Excel book that details tasks, the resources responsible for each task and the timeframes in which the tasks will be accomplished. Within the Project Plan we make our best effort to include all known things we will require from the customer to ensure a successful implementation.

This is the “calendar” by which we measure the project. Milestones and sign-off points may be noted within the Project Plan.

Build

During the Build, the Design is set into action. All implementation decisions and all processes that have been developed and verified during Design are adapted to physically construct the system in a test or production environment. User procedures may also be developed during the Build. These procedures may be the foundation for the end-user training, which occurs at the latter end of this work. (*refer to the diagram at the beginning of this section to see that training is woven throughout the process*)

The tangible deliverables from Build may include Status Reports, Change Orders and Project Escalation Documents.

Status Report

The Status Report clearly documents and communicates the implementation status as well as any other issues that need to be communicated to the customer. The Project Manager completes the Status Report with input from the entire project team and the report is emailed to the customer, then discussed with the customer and all project team members on an agreed upon schedule. The Status Report contains information regarding what took place during the past reporting period and what events are scheduled for the upcoming weeks. Depending on the agreement with the customer, this report may also contain budget analysis such as budgeted hours as well as the hours billed to date for the implementation and the variance between the two.

Change Order

The Project Manager creates the Change Order when the customer requests services that are not specifically outlined in the S.O. #2 (or related Service Order) and may change billing estimates. It contains a detailed explanation of the services to be provided along with the estimated hours it will require. The Change Order document is used to communicate the scope change and to confirm that the customer agrees to the budget and scope changes. It contains a detailed explanation of the services to be provided along with the estimated hours it will require. An authorized customer signature is required to execute this document and perform the related services.

Project Escalation Document

Occasionally events occur that have an adverse impact on the project timeline, budget or risks. These types of events may need to be documented and their impact needs to be communicated to the customer. Anytime such an event occurs, the Project Manager may create a Project Escalation Document and request the customer's signature.

Test

A successful Build relies on accurate input from the Design and depends on precise execution of system construction. The Test is where we help ensure that the system and users are ready to Deploy and is of paramount importance to the success of the project. Testing includes verifying accuracy of configuration, customizations, data conversion, system performance and user aptitude.

The tangible deliverables from Testing may include the Readiness Assessment and other documentation as requested by the customer.

Readiness Assessment

The Readiness Assessment serves as the final checkpoint for the client and Inscio prior to deploying the system. The purpose of the document is to help discover areas that may require additional attention. Before Deploy, each section of the assessment should be thoroughly completed and signed off. The Readiness Assessment is a confirmation that the requisite testing has been performed and documents analysis of the following project areas such as data, training/user capability, system performance, connectivity, customizations, reports and system security.

Other Documentation

When included in the S.O. #2, or a subsequent Service Order or Change Order, Inscio provides custom developed documentation specific to the implementation. An example of this may be user procedures. User procedures are step-by-step references that detail the customer's key processes. These procedures focus on the "how" as opposed to the "why." Sections typically include daily processes, periodic processes, reporting and maintenance. The procedures may be employed for user training, for support and are valuable for use by new employees or temporary labor.

Train

Training cuts across multiple phases of the implementation lifecycle. This is one area that does not have a defined beginning and end, but travels in parallel with the entire implementation.

Effective Training on the software application is integral to the long-term success of the solution. Countless studies have identified Training as a key differentiator in technology adoption and effective use of systems. We sell, implement and support extremely powerful business management tools that can transform the way our customers do business. We offer training designed to help our customers use their solution to the fullest potential.

We offer several types of Training and each has its place, dependent upon the needs of the client. In general, we classify these different types in the three training areas described below.

eLearning	Classroom	Custom
eLearning, is internet-based training will allow you to have access to the training you need, 24 hours a day, 7 days a week from your home or office. eLearning affords you the ability to skip material you already know and understand, and move onto the issues that need better explanation.	Classroom training is designed with a modular approach and covers topics ranging from setup options through posting transactions and reporting. This type of training includes Microsoft certified training materials and curriculum.	Developed over the course of your implementation, this training is tailored to your organization and your project plan. Training curriculum is developed using your objectives, your company data and training takes place within your implemented system environment including any customizations.

As an approach to training, we have found that many customers prefer to train the project team early in the implementation and train all users preceding Deployment in more detail and more specific to the particular implementation.

Training approach and expectations are usually identified in the S2PS, then confirmed on the S.O. #2.

Deploy

Deploy is the culmination of each of the steps within our methodology. The primary element of the Deploy phase is to “go live” with the software solution.

The deliverable for Inscio in the Deploy phase is a physical presence at the client site to assist them in all types of transaction processing, operational assistance and continued over-the-shoulder training.

The objective is for the customer to gain independence and confidence in the use of their system. At this time, we encourage customers to review and update documentation such that it mirrors actual use of the system.

Of course Deploy is the end of the implementation, but just the beginning of relationship with the customer. We continue to support the client with as needed and look for additional ways to provide value.