



Advantage Business Systems

OnTrack

**Implementation Methodology
From Advantage Business Systems**



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OnTrack - Implementation Methodology from Advantage Business Systems

Introduction and Scope

The purpose of this guide is to provide an introduction to the key elements of OnTrack the Advantage Business Systems Implementation Methodology. OnTrack is a structured approach that consists of a project delivery methodology and project management methodology based on experience gained over hundreds of implementations. Project delivery consists of four phases covering the implementation lifecycle. This guide outlines these phases as well as the Project Management process. It describes what is involved in the implementation of a new solution; the procedures followed and the benefits of adhering to a structured approach. Potential project risks and steps taken to minimise them are also identified.

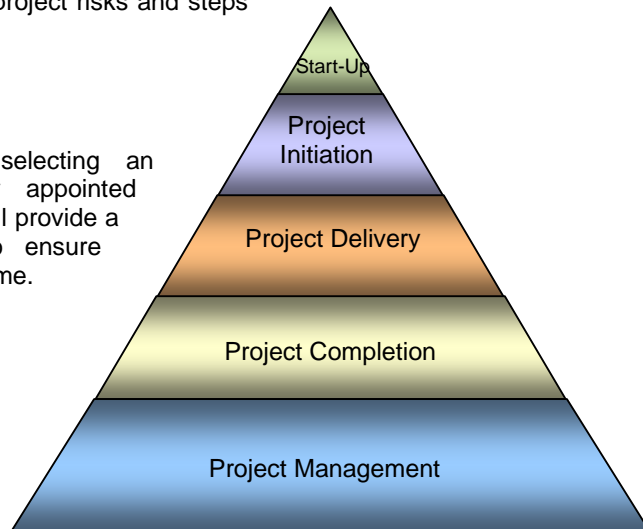
Who should read the guide?

Whether you are in the process of selecting an implementation partner, or have already appointed Advantage to carry out a project, the guide will provide a useful breakdown of the steps taken to ensure successful project implementation time after time.

Implementation Methodology Objectives

The main objectives of the methodology are to:

- Ensure good quality service delivery
- Provide consistency of approach
- Minimise risks associated with implementation projects
- Enable knowledge capture to provide continuous improvement
- Ensure client's expectations are met or exceeded
- Deliver a successful project, on time and to budget



We will now explore the four delivery phases of OnTrack, before looking at the project management methodology that underpins the project delivery process.



Phase 1: Project Start-Up

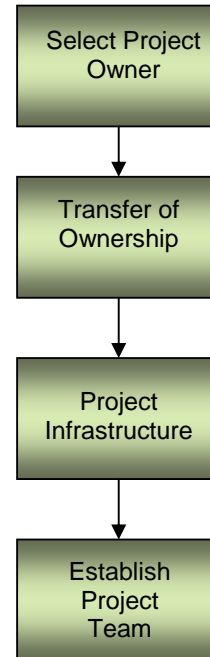
Outline

Having placed an order for the implementation of a new business solution, Advantage takes care of all the necessary steps to get the project started.

This phase establishes the project infrastructure that comprises a dedicated and highly experienced project team, project documentation and systems. Advantage also undertakes a project ownership and knowledge transfer exercise internally, to ensure that all members of the delivery team have an understanding of what is involved in the project. Internal clarification at this stage ensures that any potential future confusion regarding the project is avoided.

What this means to you...

- A dedicated project team for ease of contact and peace of mind, facilitating easy two-way communication to keep the project on track.
- An experienced and skilled team. Advantage draws collectively on decades of successful project implementation and technical know how to fit the skills required to the job in hand. Assigning the right team members with skills closely matched to the project requirements helps guarantee a quality service.
- A comprehensive internal knowledge transfer to the project team ensures a thorough understanding and appreciation of the project goals. This is crucial to the success of a project, contributing to the probability of achieving the agreed project targets.



Things to watch for...

A fundamental problem with many projects is a misunderstanding of what is and is not required. Advantage works closely with you to ensure that requirements are identified at an early stage and form the foundation on which the entire project is built. In addition to Advantage briefing its project team, it is equally essential for you to brief your team at an early stage, ensuring project buy-in, co-operation and commitment to take place.

"Advantage has been selected because of the quality of their response. We have probably been a very hard client to please at times but Advantage has responded well to all of our queries."

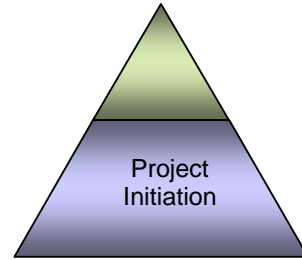
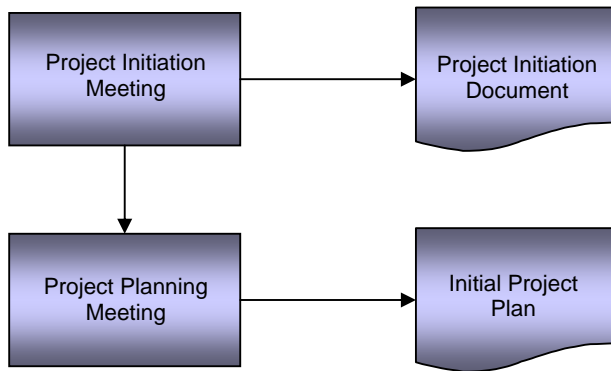
Andrew Grice, Secretary - The Institute for Animal Health



Phase 2: Project Initiation

Outline

Having established the project team, together we establish the “rules of engagement” under which the project will operate. The project scope is clarified, communication is established, and roles and responsibilities are set.



Firstly, a **Project Initiation Meeting** is held to: Confirm key dates and objectives for the project

Clarify the scope of the project and deliverables

Discuss project approach in detail including project management mechanisms

Provide enough information to produce a Project Initiation Document (PID) and Initial Project Plan that encompasses key milestones with details of install and implementation study dates.

Based on our discussions, Advantage produces an initial Project Initiation Document (PID) and initial Project Plan.

Once the PID is produced, a Project Planning Meeting is organised to:

- Agree and sign the PID
- Finalise the initial project plan

The project plan is developed further during the Design Process once details of the software requirements, such as workflows and processing flows, are finalised.

What this means to you....

The Project Plan becomes an extension to the Project Initiation Document and documents key milestones with details such as software installation and design workshop dates. It provides a comprehensive roadmap of tasks to be performed. This means everybody involved in the project has a clear understanding of what needs to happen and when.



- The PID covers project objectives, goals, scope inclusions and exclusions, project assumptions and dependencies, project plan, roles and responsibilities. By producing a PID, a crystal clear definition of what is and is not included in the project is established, highlighting at an early stage the guidelines and scope within which the project will operate. By establishing a clear understanding of the project and its goals, both the Advantage and internal project teams work together towards the same objectives, thereby increasing the probability of completing the project on time and to budget.
- Targets and delivery dates are identified and documented and actual deliverables outlined. Expectations are set and a measure for project delivery established. This helps everybody to focus on their individual and team roles in the project.
- With the completion of the Project Initiation stage, a solid base for the actual implementation is established. This early groundwork provides a solid foundation on which the subsequent delivery phase is based.

Things to watch for....

Be sure to clarify roles and responsibilities at an early stage in the project. Failure to do so may result in people losing focus and the project falling behind schedule. Clarification of roles and responsibilities over the project lifecycle is key to success. Advantage carries out assignment by responsibility ensuring a task is carried out to an agreed high quality standard within an agreed timescale.

Beware of “scope creep”! This occurs when the deliverables of a project are allowed to change unchecked, therefore impacting timescales, resources and financial cost. Ensuring the scope and deliverables of a project are well defined at this stage will give everybody concerned strong controls over what is included in the project.

“Advantage had a very professional approach..... They were able to meet our business requirements and the implementation timescales we had set.”

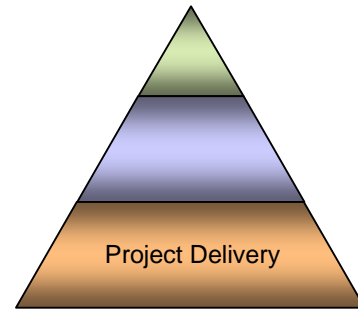
Fiona Stratford, Finance Director – Institute of Grocery Distribution



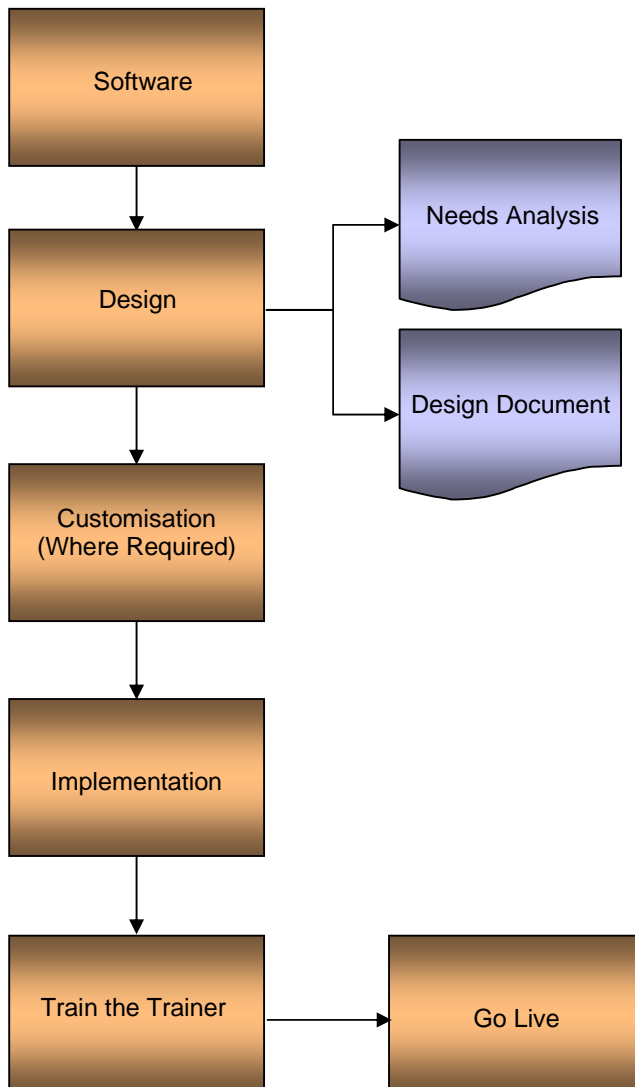
Phase 3: Project Delivery

Outline

Project Delivery represents approximately 90% of the implementation effort and includes installation, overview training for the project teams, design, testing, software set-up and 'Go Live'. If any customisation is required, this will also be completed during this phase of the project. During Project Delivery, Advantage implements the solution identified in the project scoping exercise, start-up and project initiation phases, delivering the project based upon agreed quality standards. Advantage works to ensure your organisation has a clear understanding of the delivery phase.



a) **Software Installation** – Once the hardware and network infrastructure is in place, Advantage installs all of the software required for the project.



b) **Design Process** – The design process comprises two elements – a Needs Analysis exercise and Design Workshops to identify detailed requirements and make key set-up decisions that are documented and subsequently validated during the implementation process. The Design Process is a key milestone in the overall delivery process. Advantage establishes an overview of needs including the application modules required during the pre-sales process. This phase determines the specific set-up and design of those modules to meet your specific business requirements.

c) **Customisation** – The analysis element of the design process will determine whether the solution requires any customisation in order to meet key business process requirements. Any customisations required will be detailed in the gap-fit document. If this is the case, the customisation work will be undertaken during this phase of the project. Subsequent testing will be carried out to confirm that the customisation meets the business process requirements as outlined in the agreed design document.



Any and all customisations are thoroughly documented, this enables the support team to understand what modifications have been made, which in turn facilitates a better support service. It also future proofs the solution during the upgrade process and helps to ensure that customisations can be easily re-installed, or in the event that the functionality has been built into the core product, that they are removed.

d) **Implementation Process** – This process bridges the gap between decisions taken at the Design Process and ‘Go Live’ and includes set-up and testing.

Every implementation is different; the key steps in the Implementation Process will include some, and possibly all of the following:

- The set-up of all modules based on the outputs of the Design Process, taking into account, for example, specific workflows and processes particular to your business
- Overview training for the project and test teams. This will enable your project team to understand how the solution works and contribute to discussions with regard to set up.
- Data transfer scoping
- Integration scoping and application development as specified in the design process
- Testing
- Preparation for “Go Live”

Throughout the implementation process support is provided by Advantage. Our application and technical consultants work closely with your project team to ensure the system is implemented in line with your requirements and as agreed in the project deliverables.

e) **Train the Trainer** – Detailed training is provided to members of the client project team to enable them to deliver specific end user training.

f) **Go Live Hand Holding** – Advantage provides onsite support during the Go Live process to ensure a smooth transition to the new system. This is typically during the first week of Go Live and at the first month end, to assist in the generation of the first month’s management accounts.

At all stages during the project delivery phase, a Consultant Work Report (CWR) is provided outlining the scope and objectives for each day or piece of work. Work in progress together with completed tasks are documented, listing successes and challenges encountered. Steps required to complete outstanding tasks are clarified and successful practices detailed for inclusion in future projects.

Following a successful Go Live, a comprehensive level of ongoing telephone support is given, ensuring complete peace of mind.



What this means to you....

- Throughout the Design Process, you have the assurance that the implemented solution will meet your business requirements. Validating the design of the system reduces risk and therefore increases the likelihood of a successful project.
- You can be safe in the knowledge that at key times such as “Go Live” and first month-end, an expert will be on hand to guide you through the new solution should you have any queries. This means you are able to maximise the productivity of the department as a whole, using the system for processing and reporting purposes as defined by the deliverables of the project.
- Full documentation of the Delivery Phase details discussions and agreed outcomes about specific work both before it is due to be carried out, and after it is completed. This means that the correct work is completed to a consistently high standard, ensuring that those working on the implementation are focused on achieving the objectives of the project.
- You have peace of mind knowing that the key Delivery Phase of your implementation is based on the same methodology, and employs the same processes, used in hundreds of other successful implementations, in turn reducing the level of risk associated with this type of project.

Things to watch out for...

Beware of under allocating resources to the project, a lack of client time allocation can be a problem with this type of project. To overcome this, Advantage works with you to identify at an early stage the amount of time required from your project team. This ensures the right level of resource is committed to the project, whilst minimising its impact on other day-to-day tasks.

“We chose Advantage as implementation partner because of its reputation and visibility in the marketplace. We were impressed by the professionalism of Advantage throughout our discussions and by the company’s reputation for high quality service”

Shobhna Shah, Finance Director – Royal College of Physicians



Phase 4: Project Completion

Outline

By definition, all projects have a completion date. Advantage marks completion by undertaking a number of tasks.

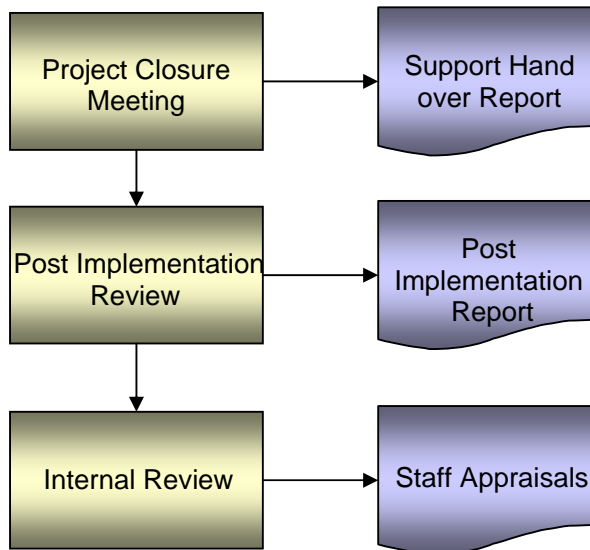
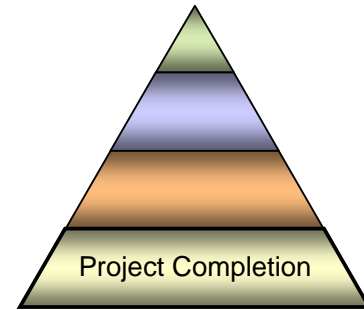
Those tasks include:

Project Closure and Support Handover Meeting

Advantage will meet with you to ensure that project objectives have been met, before closing the project and handing over to support.

Post Implementation Review

Following completion of a project, a meeting is held to review the overall implementation. The meeting enables both parties to review key phases of the project and reviews elements such as the processes used, communication, consultant performance and the overall methodology. A Post Implementation Report is created, summarising and analysing the entire project history.



Internal Handover

Following the project closure meeting, an internal handover of your account takes place at Advantage. The project manager, who during your implementation has been your main point of contact at Advantage, will handover all details of your implementation to a dedicated account manager and the Support team. This provides an in-depth understanding of your implementation, enabling us to provide a high quality service moving forward, and a good ongoing relationship between your organisation and Advantage.

Your account manager is now responsible for maintaining the relationship between our two companies, ensuring that we deliver the high level of customer service that you expect.

Internal Project Review

The final stage of project completion is an internal review of the project by the Advantage Support Management. This involves reviewing all elements of the implementation, incorporating both your comments and those of the project manager. A review is also held with the consultant(s) involved in the project to look at their specific performance.

Advantage is a leading MBS partner with a wealth of experience...the Advantage team gave us technical confidence in their ability to deliver."

Barry Wright, Group Financial Controller - The Cobra Group Plc



Project Management Methodology

Outline

The Project Management Methodology is the foundation supporting the entire project delivery encompassing project control and management mechanisms.

The Project Management foundation comprises several elements which fall into three categories:

Planning

- **Planning** consists of two elements:
 - Project planning relates to the task elements of the project and incorporates elements such as the scope of the project and specific tasks. It identifies the “what” and the “when” elements of the project – what needs to happen and when does it need to happen.
 - Resource planning relates to the people elements of the project and will be dictated to by project planning. It identifies the “who” elements of the project and its purpose is to ensure the right people are available at the right time.

Control

- **Change Control** ensures that any required changes are incorporated into the project with minimal impact on resources, timescales or cost. It enables the project to remain flexible, yet focused on its deliverables.
- **Financial Control** manages the project’s financial progress and ensures it remains within the agreed budget.
- **Risk Management** documents the risks involved with the project and provides contingency plans to overcome them. Risks may be business, project or specific stage related. Each potential risk identified is measured against probability and severity of occurrence. Based on the outcome of this analysis each risk is assigned a management action to avoid the risk occurring and a counter measure to address the risk should it become apparent. A typical project risk may be the resignation of a key member of the project team. If appropriate Advantage will produce a “Risk Register” at the beginning of the project to minimise the impact of any potential risks.
- **Issue Management** allows issues to be identified, documented and resolved. Unlike risks, issues only become apparent during the project and are difficult to predict. To minimise their impact regular meetings are held to identify and resolve any issues as early as possible to minimise their impact on the overall project.
- **Team Management** is an internal process, but it is equally important to your project team as it is to Advantage. The process ensures team objectives are set and that regular and relevant communication is undertaken, so that all members of the project team are clearly focused on their role in the project. Good team management during a project is key to the success of the overall implementation.



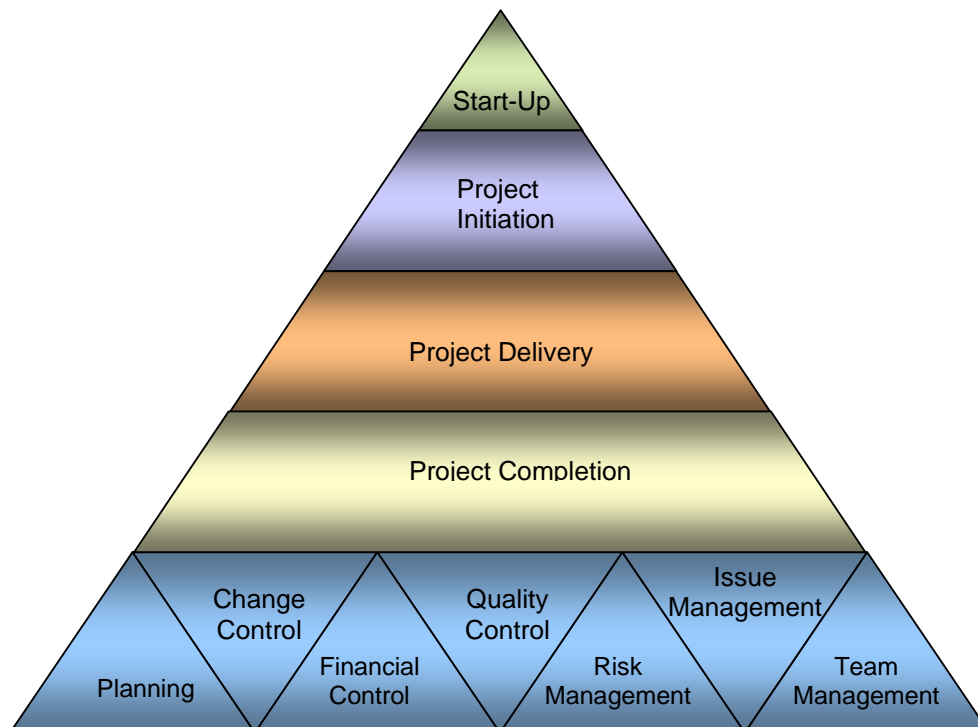
Quality

- **Quality Control** guarantees each project is managed and delivered in accordance with Advantage quality standards. Regular project reviews by a Senior Project Manager take place to ensure this is the case.

Advantage supports these elements through regular project review meetings, when each area of planning, control and quality is reviewed.

What this means to you...

- Project management increases the visibility of the key areas of a project and enables you to monitor and control, elements such as progress, quality, issues and risks. Without project management it is impossible to achieve the objectives of the project.
- By employing our project management methodology you provide focus and objectives to the project team and therefore increase the probability of a successful project.
- Advantage delivers consistent project success by using a solid framework supported by a project management methodology – delivering your project on time and to budget.
- Project management forms the foundation to build success during the implementation and helps to ensure a mutually beneficial ongoing relationship post implementation.





Things to watch out for...

Be careful not to underestimate the time allocated for project management. The implementation of a new business solution is a complex process and requires careful planning and control. Our project manager will work with your project team to ensure an appropriate level of resource is available. Board level sponsorship of the project will also help to gain commitment, and increase the probability of achieving the project objectives.



Ten Top Tips For A Successful Implementation

- 1) Choose an implementation partner that has the experience, expertise and technical depth to carry out a successful implementation.
- 2) Gain commitment from the board for the project and assign an executive sponsor to back the project at the highest level within the company.
- 3) Have clear and measurable project objectives and requirements.
- 4) Prepare and brief staff, get buy-in and commitment and set realistic expectation at an early stage.
- 5) Use project milestones to measure project progress and keep it on track.
- 6) Create, discuss and document project contingency plans.
- 7) Agree and work to project timescales ensuring a clear start and finish to the project.
- 8) Put time aside for training and follow up work.
- 9) Communicate any outstanding tasks and book time for their completion.
- 10) Ensure enough time is built in for comprehensive testing and issues capture.



Summary

Advantage combines strategic business experience, technical expertise and proven management techniques to ensure successful project implementation time after time.

Tried and tested - OnTrack has been the basis for many successful projects delivered over the years. Whilst it provides a solid, structured and well documented process, Advantage constantly innovates and updates its practices to ensure that the very best methods are always employed.

Improved on an ongoing basis through a process of continual learning, our large team of specialised project managers and consultants have accumulated a high level of experience and expertise to ensure your project is delivered on time and to budget.

OnTrack – Empowering Implementation Through Experience and Expertise



An Introduction to Advantage Business Systems

Advantage supplies, implements and supports Microsoft Dynamics GP, Microsoft Dynamics NAV and Microsoft Dynamics CRM from Microsoft Business Solutions. Our years of experience and in-depth expertise has led us to be awarded the exclusive title of Microsoft Business Solutions 'Outstanding Partner for Europe' for four consecutive years. Advantage also delivers customised IT managed services to a wide range of clients.

To find out more about Advantage Business Systems or OnTrack please call 020 7877 0211 or email info@advantage.co.uk.

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