



Implementation Methodology

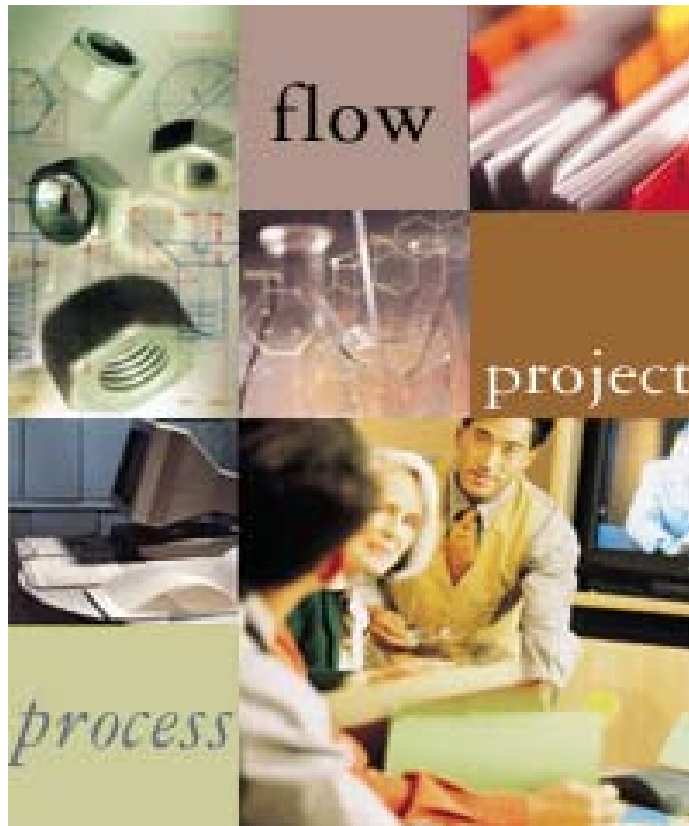


Table of Contents

Executive Summary..... 3

Implementation Plan Overview..... 4

Project Phases and Phase Definitions 5

Project Execution Elements and Definitions..... 12

Project Team Organization..... .12

Communication..... 17

Post Implementation 20

Executive Summary

The purpose of this document is to provide our clients with a vehicle that they can use to envision how their project will progress from the time the contract is signed to the time they go live and beyond.

The benefits of a new software implementation project, most notably efficiency, increased performance and reporting, are usually easy to imagine. However, we normally find that not enough attention is paid to how you get from contract signing to going live. Good intentions and well meaning aspirations do not translate into a meaningful and successful implementation. There must be a plan and there has to be mechanisms in place to support and execute the plan. With that in mind, this document will discuss the various planning and execution elements of a project.

Through numerous implementations in businesses of all sizes and types we have learned that there are many similarities between implementations and there are vast differences. The differences are what make these businesses unique and the overall project approach, as outlined in the following pages, is particularly suited to identifying and addressing the unique aspects of your business.

The overall plan is broken down into phases. Each phase has various task components. While we believe that every project should incorporate each of these phases, your business may or may not need all of the listed component tasks of each phase. In conjunction with your project team we will help you develop a plan, using this document as a guideline, which gives all of us the best chance of meeting your project objectives and functional business requirements.

While it is usually the objective of RMI and its clients to avoid project risks we nonetheless must consider the management of risk to be a top priority of both our organizations. Since we need to be cognizant of risk management issues in all phases, it is implied here that risk management is a tenet of the overall project management strategy. Risks need to be identified and evaluated since they could adversely affect the attainment of the project objectives and the corresponding timeline. In the Planning Phase, strategies will be created to plan and implement measures that will avoid, overcome or compensate for the element of risk.

After looking at the following pages you should be able to see how your business will progress through each of the phases that will make up your total software system implementation. Remember to keep in mind that while we have outlined many different aspects of the implementation, we will help you tailor your plan to your exact requirements. The end result will be a professionally implemented solution that meets or exceeds management and end-user expectations.

Implementation Plan Overview

- **Project Phases**
 - *Phase Elements*
 - *Phase Details*

- **Project Execution Elements & Definitions**
 - *Team Organization*
 - *Communication*

- **Post Implementation**
 - *On Going Support*
 - *Additional Requirements*

Project Phases

The six phases listed below are intended to encompass all of the activities required to successfully complete your project. As stated in the executive overview section, all of the tasks in a given phase may not be used or tasks may be added depending on your situation and your requirements. The six phases are listed below. Details of what comprise each phase are defined in the next section.

- **Phase 1 - Planning, Preparation, Scope Definition**
- **Phase 2 - Training**
- **Phase 3 - Standard Software Installation and Usage**
- **Phase 4 - Customized Software Installation and Usage**
- **Phase 5 - Simulated Live Operational System**
- **Phase 6 - Production Rollout / Go Live**

Phase Elements

Phase elements are broken down into three categories. Within these categories are the tasks and objectives of each phase as well as criteria for when and how these phases should be considered complete.

- **Activities**
- **Deliverables**
- **Completion Criteria**

Phase Details

Phase 1 – Planning, Preparation, Scope Definition

Management objectives for the project are stated and refined. Overall system and functional requirements are identified. Timelines are established, resources are allocated and infrastructure is added or changed to support the activities associated with this phase. Additionally, procedures and individuals will be identified to address new issues that may arise during the implementation as well as changes that need to be made to the system while ongoing activities are occurring.

<i>Activities</i>
Develop Project Charter
Develop Project Plan
Develop Staffing Plan
Develop Training Plan
Setup Project Infrastructure
Setup Project Facilities
Setup Project Systems
Work and Status Management Setup
Issues Management Setup
Change Management Setup
Support Management Setup
Security Outline

Phase 1 Completion Criteria

While some aspects of this phase may continue to be refined as the project progresses, such as the staffing or training plan, the Project Planning and Preparation phase is considered complete when the project team from both RMI and your organization are in agreement that the deliverables are acceptable. Additionally, the project team should feel they are prepared to move to Phase 2 and begin working with the software.

Phase 2 - Training

All RMI implementations include education programs designed to meet your employee's needs before, during, and after your implementation. Training will address the standard software, customized portions of the software and specific implementation or functionality issues. We also tailor our training plan to meet your employees' timing, location, and learning style. The training plan will allow for train-the-trainer and classroom training to match your specific needs.

While we address training in Phase 2, training activities will most likely continue through Phase 6. Early in the project, team members will be trained in the usage of the standard software. As customized software (if applicable) is developed and finalized in Phase 5, training activities will be scheduled to make sure the appropriate team members possess competency in the customized portions of your system.

<i>Activities</i>
Functional Training For Standard Software
Functional Training For Customized Software
Functional Training For End-Users

Phase 2 Completion Criteria

Phase 2 is considered complete when designated users are trained on usage of the standard software as outlined in the training plan. Additionally, technical and administrative users are also trained in their respective areas of the system.

Training for customized software, if necessary, will be addressed as a task in Phases 4 and 5.

Phase 3 – Standard Software Installation And Usage

During this phase the project team focuses on learning and making maximum use of the standard software to support your business processes. The team will map data and business procedure steps into the system to begin to match the software to the clients needs. As a general rule, we want to match the standard software as much as possible to the functional requirements of your business. Our consultants may also make suggestions about how to achieve desired end results of a requirement by doing something a little differently using standard software functionality. Also during this phase we will be identifying enhancement opportunities and defining interface and data conversion requirements.

<i>Activities</i>
Preliminary System Configuration
Preliminary Entry Of Setup and Master File Data
Finalize Work Flows
Preliminary New Work Flows
Preliminary Scenario Definition
Preliminary Data Conversion Planning
Functional Area Simulation Walkthroughs
Identify Functional Gaps
Develop Use Cases

Phase 3 Completion Criteria

Phase 3 is complete when the standard system has been matched as closely as possibly to the functional requirements of the business. At this point, all functional gaps (where standard software did not meet a requirement or objective) have been identified, and all change specifications have been developed.

Phase 4 - Customized Software Installation And Usage

This phase is focused on the development and testing of any enhanced and interfaced system. During this phase the project team will be developing and testing the software enhancements identified in Phase 3. The project team will also be developing and testing any required third party interfaces to connect other systems as well as our data conversion tools required to migrate data from your current systems.

Phase 4 often affords management and staff the opportunity to begin to see how their system will come together and how it has been tailored for their requirements and environment. In other words, they begin to see the fruits of their efforts from Phases 1, 2 and 3.

<i>Activities</i>
Finalize System Configuration
Finalize Data Coding
Finalize New Work Flows
Finalize Scenario Definition
Gap Development And Testing
Output Design, Development And Testing
Data Conversion Design
Development And Testing
Interface Design, Development And Testing

Phase 4 - Completion Criteria

This phase is complete when the enhanced system has been tested and the core operational software has been finalized and approved.

RMI puts a lot of emphasis on the testing portion of this phase. We understand that it is virtually impossible to test every scenario that may arise in the course of everyday operations but a well thought out testing plan is essential.

Phase 5 – Simulated Live Operational System

This phase is focused on putting the complete system through its final testing and getting the first location (if multi location entity) into simulated live operational mode. Testing plan results are verified and confirmed.

During this phase you should begin preparing end-user training materials and programs that are specific to your business processes. We will also convert data from the first location and execute parallel or trial operations on the new system.

<i>Activities</i>
Finalize Data Conversion
Finalize Output
Acceptance Testing
End User Training
Test & Confirm Security Setup
Documentation
Trial/Parallel Operations

Phase 5 -Completion Criteria

This phase is complete when the first site is simulated live and the system is prepared for actual go live or production rollout to other locations. Of course the preparation of production rollout all depends on client's decision to do one location at a time or all at once. RMI will work with client project team to decide on best course of action for rolling out other locations.

Phase 6 - Production Rollout / Go Live

The Production Rollout / Go Live phase is focused on educating users and converting the operations and data at new locations or going live at a single location depending on the client situation. We will also address issues that will invariably pop up during the course of normal daily business operations. RMI along with the client project team will be able to keep the “go live” issues to a minimum if the plan in the first five phases has been followed.

<i>Activities</i>
End User Training
Location Data Conversion
Go-Live Support

Phase 6 - Completion Criteria

Phase 6 is complete when the selected company locations are live and the user community is prepared to conduct the business operations as intended with the new system.

Project Execution Elements & Definitions

In an effort to support the execution of the Project Phases we have outlined elements that are typically used in the execution process. These include descriptions of team structures, responsibilities, project documents, etc. This structure as with all structures within this document is subject to change to suit your particular implementation project.

Project Team Organization

Client Project Team

The client has responsibility for the project as a whole, which is managed internally by the Client's Project Manager. The focus of the Client Project Manager should be to support the Client Services Team Leaders and Team Members in carrying out the implementation. Definitions of the Client Project Manager, Work Team Leaders and Work Team Members are detailed below.

Project Manager

The Client Project Manager is available full-time for the project. The Client Project Manager is responsible for updating the project plan every 2 to 4 weeks depending of the entire time span of the project. The Client Project Manager is the main source of communication and coordination with the RMI Project Manager. The Client Project Manager is also represented on the Steering Team, and is responsible for executing the Steering Team's decisions.

Responsibilities:

- Internal project management, i.e. coordinating and managing the implementation activities.
- Monitoring the project's progress.
- Anticipating future (project) developments.
- Initiating and monitoring the (periodic) transfer of required information to the organization.
- Drawing up and promoting the acceptance of work schedules.
- Reporting the project's progress to the Steering Team by means of the *Progress Report* and the *Financial Report*, and to the project group by means of the *Project and Activity Plans*.
- Managing the project documentation.
- Ensuring that the know-how of all project participants is sufficient for the purposes of the project.

- Keeping the company informed about the project and its progress.
- Weekly review and approval of consultant timesheets and expenses.
- Managing and independently operating within the total budget (or partial budgets).
- Managing, scheduling and employing the required facilities, e.g. equipment, project room(s), etc.
- Deploying the available internal project capacity.
- Responsible for the performance of the internal project participants.
- Has insight into the logistic control and organization of the company.
- Has authority over the project participants.
- Is a member of the project group and steering team

Work Team Leaders

Work Team Leaders are the primary drivers for completion of work in their assigned areas. They will drive the detail of decision-making and monitor the completion of work in their team.

Responsibilities:

- Are responsible for the implementation of RMI ADVANTAGE in a particular functional area.
- Internally promoting the project.
- Testing various scenarios during the simulation phase.
- Charting any decisions relating to organizational, functional and technical bottlenecks resulting from the “fitting” process.
- Producing and presenting deliverable products as described.
- Setting up a training program.
- Making any necessary content-related decisions

Work Team Members

Responsibilities:

- Supporting Work Team Leaders in making content-related decisions
- Acquiring the know-how and skills to carry out operational tasks in a satisfactory way.
- Executing the business simulation
- Implementing activities when requested by the project team
- Support and training of end-users

- Issue resolution and decision making authority within their respective discipline

RMI Project Team

The RMI Project Team is responsible for working together with the Client Project Team to help achieve the objectives as stated in the Project Charter.

Project Manager

There will be a single RMI Project Manager assigned to the project. The Project Manager has sufficient authority to make changes and is the primary contact for communications and coordination between RMI and the client. The Project Managers role in the project is to support and advise The Work Team Leaders and the Team Members.

Responsibilities:

- Internal project management, i.e. coordinating and managing the implementation activities.
- Monitoring the project's progress.
- Anticipating future (project) developments.
- Initiating and monitoring the (periodic) transfer of required information to the organization.
- Drawing up and promoting the acceptance of work schedules.
- Reporting the project's progress to the Steering Team by means of the *Progress Status Report*.
- Managing the project documentation.
- Ensuring that the know-how of all project participants for the purposes of the project.
- Keeping the company informed about the project and its progress.
- Weekly review and approval of consultant timesheets and expenses.
- Managing and independently operating within the total budget (or partial budgets).
- Managing, scheduling and employing the required facilities, e.g. equipment, project room(s), etc.
- Deploying the available internal project capacity.
- Responsible for the performance of the internal project participants.
- Has insight into the logistic control and organization of the company.

- Has authority over the project participants.
- Is a member of the project team and steering team

Team Members

Depending on the scope and scale of the implementation, one or more RMI consultants will be assigned to work with one or more Client Work Teams serving basically as a consultant for the entire team. The RMI consultants will most likely be writing up the change requests that are generated as a result of working closely with the Client Work Team and Client Team Members.

Responsibilities:

- Supporting Work Team Leaders in making content-related decisions
- Acquiring the know-how and skills to carry out operational tasks in a satisfactory way.
- Executing the business simulation
- Implementing activities when requested by the project group
- Support and training of end-users
- Issue resolution and decision making authority within their respective discipline

Joint Project Teams

Steering Team

The Steering Team will meet as needed. Usually a fixed meeting date is suggested during the planning stages such as every Monday morning, etc. The Project Managers from both the client and RMI will have responsibility for the Steering Team agenda and follow-up.

Responsibilities:

- Monitoring plan variance (scope, schedule, cost).
- Making available all resources necessary for project execution.
- Review, approval or rejection of phase deliverables.
- Internally promoting the project and informing the organization.

Members:

- Selected client and RMI executive personal
- Project Managers

Communications

An essential element to any successful project is communication between RMI and the Client organization. This means addressing communication issues at all levels from top management, through work teams down to the individuals at both organizations. The following will define elements of our communication structure.

Meetings Formats

Team Meetings

This meeting is scheduled by the Team leader and all team members participate. The purpose of this meeting is to review last week's progress, review the active issues for the team, and discuss the Activity List for the coming week. This meeting is at the start of every week.

Project Management Meetings

The Project Manager is leading this meeting where all Team Leaders participate. The purpose of this meeting is to communicate and coordinate team status information and discuss management issues. This meeting is at the start of every week, but after the weekly team meetings.

Entire Project Team Meetings

The entire project team participates in these meetings and is scheduled by the Project managers. The purpose of these meetings is to inform everybody about general issues and the status for the project. The meetings are on a need to have basis, decided by the project managers.

Document Formats

Project Plan

There will only be one Project Plan for the entire Project. The intent is to look at the project from a high level and provide an overall scope and view of the project.

The development and maintenance of the Project Plan is done by the Project Managers. The project plan is based on activities that occur from week to week. The project plan will be updated every 2 to 4 weeks, depending on the entire time span of the project, based on actual completion dates of activities. The updates to the project plan are based on input from the Team Leaders, Team Status Reports and Activity Plans. Every time the project plan is updated, the previous version is saved for historical purposes.

Activity Plans

There will be only one Activity Plan per team. The Team Leaders will manage the daily activities within each team. All activities that occur are in accordance with the Activity Plan. This Activity plan will contain a two week list of tasks assigned to individual team members. It will be managed by the team leader. Once a week the team will meet to discuss and update the Activity Plan. The activity plan directly feeds the Project Plan that is managed by the Project Manager. The tasks listed in the activity plan will relate directly to a deliverable or activity in the Project Plan.

Team Status Report

Team Leaders manage the Team Status Reports that will describe the actual status within each team. The Team Status Reports will be completed at the end of every week for the Project Manager to review. It contains information regarding variance from the scheduled plan, Hours spend on the project during that week for each team member and a summery of the functional work completed during that week.

Project Work Documents

In order to perform the daily work within the project we use the following documents both as work documents and as documentation.

Issues

Any Issue that comes up within the individual teams and needs attention at a later point in time will be written up in a Microsoft Word template for issues. These Issues are assigned to the person that will resolve or answer the issue.

Change Requests - Modifications

Any request to change or modify the standard application will be written up by the Team Members in a change request form. These change requests go through the process of estimation, approval, development and testing.

Post Implementation

On-going Support

At RMI, we realize that our involvement in the project does not end when you go live. Quite the contrary, it will be the beginning of what we hope will be a long lasting business partnership.

RMI has many options for customer support. The ADVANTAGE / Navision Edition software is the result of the work of hundreds of people working for many years to deliver a comprehensive system that meets your needs. It is unfair to think that the average user of this application can grasp all of its capabilities from attending a few training classes. Your system users need to be able to call upon trained individuals to discuss the features available within the application and to get answers to functionality and technical questions, so you can maximize the benefits you receive for a fixed monthly fee. That is why RMI offers a Help Desk Support Program.

Accurate answers to your day-to-day questions in an easy and fast way. We accomplish this by having a trained, full-time staff available for telephone support from 8 A.M. to 8 P.M. Eastern Standard Time. The “spirit” of the program is to educate your staff, not to have RMI perform your work for you.

Additional Requirements

RMI is here to service you for any additional requirements that may arise after you have taken ownership and control of your system. Your business will hopefully grow and your business model may change. You may also hire new staff or replace existing staff that needs to be trained. Whatever the requirement, we will work with you to achieve the desired results. As we mentioned in the support section, we want to be your “Business Partner”.