Legacy System to Pro-Cloud Bridge

DATA DISCOVERY

UAT TEST PLANS

DEEP DIVE

PROJECT PLANS VIA SMARTSHEET

GLOSSARY & TERMS OF REFERENCE

MODULAR TRAINING PROGRAMMES

FACE-TO-FACE & ONLINE

BI BUSINESS DATA VISUALISATION

DATA IMPORT TEMPLATES

PRO-CLOUD BRIDGE TOOLKIT

TEST PLANS

Initial Customer Meeting and Product Demonstration

Ensuring the customer is knowledgeable about CSS, the service they have contracted and what to expect along, understanding Pro-Cloud and post go-live support is essential if the implementation is to move forward with confidence and realistic expectations from all parties. This consultation will be the most important of the journey, listen and ensure the customer immerses themselves into the world of CSS and Pro-Cloud.

FM653644

Customer Suitability Assessment

- Project sponsor
- Management buy in
- Risk assessment complete
- Credit check
- IT infrastructure
- Specification can be met
- Partnership working confirmed
- Agreement to project plan and resource confirmed

Initial Customer Meeting and Product Demonstration & Customer Suitability Assessment

WEEK 1

CUSTOMER DISCOVERY THROUGH LMS

Customer works through discovery and implementation videos to understand what is expected of them and what is expected of the Implementation Team

PROJECT PLAN

PRO-CLOUD STAGING AND ACCEPTANCE

PRO-CLOUD OPERATIONAL TRAINING AND COMMUNICATION

CUSTOMER AND CSS SUPPORT PROJECT HANDOVER

Training delivery strategies

Train the trainer

Pre training and Prizes

Stakeholders in training

Incremental learning

Supporting Champions

Hardware Allocations

Hardware Checklist

Pre-Delivery requests (Round Up ETC)

UAT testing

Attachment to support tickets

CUSTOMER SIGN OFF WEEK 2
Contract signature and License Agreements

CUSTOMER SIGN OFF WEEK 4
Project Timelines and Resource Allocation

CUSTOMER SIGN OFF WEEK 6
Pro-Cloud Bridge Discovery Completion

CUSTOMER SIGN OFF WEEK 8
Stage Build & Testing Completion

CUSTOMER SIGN OFF WEEK 10
Data Exchanger Completed, Secure and Operational

CUSTOMER SIGN OFF WEEK 14
Training Programme Completed

CUSTOMER SIGN OFF WEEK 16
Go Live and Handover to Helpdesk

ASSET MANAGEMENT MODULE
- Asset type, batch, fleet, inventory, hire
- Labelling solutions RFID, QR, EAN Barcode
- Asset tree location set up
- Inter branch (depot) transfers
- 3rd Party supplier stock (owned and consignment)
- Stock home location
- Roaming assets linked to personnel and transport
- Asset location information, GPS and tachography, physical access and web cams. PPE access requirements
- Asset reporting
- Asset tracking requirements
- Min / Max / Re-order
- Product volume discounts
- Transport Assets
- Roaming Stock
- Repair Stock
- Scrapping
- Decontamination & Recycling

CATALOGUES
- Solution catalogue development including template data and multiple variant of contract and sales catalogue
- Single use items
- Hazardous items
- Sales price
- Collection refund
- Hire price (day, week, month, year)
- Contract catalogues
- Contract catalogue pricing and charging mechanisms
- Images
- Manufacturer links
- Warranty and end of life
- Depreciation
- Usage instructions
- Usage limits
- Linked catalogue products
- Catalogue detailed

SALES ORDER, HIRE, RECYCLE COLLECTION PROCESSING.
- Regions
- Warranty Replacements
- Retail Sales EPOS
- Processing
- Activity (goods and costs)
- Timeslots
- 2 Man drops
- Collect and Deliver
- Unpack and build
- Unpack and Demonstrate
- Receipting, email, bolt jointers, A4
- Sub contract splitting by contractor and or sites
- Activity Complexity
- Invoicing and Financials
- Online Retailing
- Paypal and online payments
- Amazon Web Services

MANIFESTING, ROUTING AND SCHEDULING, SMS TIME SLOT AND EMAIL COMMUNICATIONS.
- Route planning strategies, route all or manually route and configure route
- Threshold setup and management including factor time slots
- Volumetric for delivery and collections
- Choose and book strategies
- 23 Drops google 23+ Routific is charging model correct...
- Dynamic charging mechanism in place
- Honor time slot window feature
- Sub Contractor and Supplier Management

PURCHASE ORDER PROCESSING AND GOODS RECEIVED PROCESS
- Purchase contracts
- Purchase order processing
- Order tracking
- Exception reporting
- Goods in process
- Warranty Replace
- Global Discounts
- Closed loop sub contractor and supplier billing
- GRN Document scanning bolt-
- Supply chain management tools and portal

TASKS AND TESTS INCLUDING CUSTOM QUESTION SETTINGS
- Standard Maintenance
- Client activities
- Linked to assets
- Test locations
- Test frequencies
- Outcome management and escalation
- Task values and charging mechanisms
- Preventative Protective Clothing (PPE)
- Outcomes, Email and SMS escalation

GENERAL SETUP
- Users
- Features
- Accountancy
- Printers
- Email
- Locations
- Organisation
- Internal and external users
- Permissions
- Admin Rights and Administrators
- Clinical access options and privacy settings
- Audit
- Establishment & HR
- DNS settings
- Company configuration
- VAT Numbers
- Invoice Seed
- Company Number

DEVELOPMENT & DATA EXCHANGERS
- Bespoke (PRICE) Internal Pro-Cloud Bridge Development Specification
- Secure Bi-directional XML Data Exchangers (PRICE) Internal Pro-Cloud Data Bridge
- Exchangers Specification
- New Services Offered (Data Merge and Data Validation, postcode checks etc)
- Purchasing Systems
- Accountancy Systems
- Sub-contractor systems
- Customer ordering systems (session web services etc)
- API's standard

REPORTING
- Microsoft Power BI
- Dashboard
- Custom Reporting

HARDWARE AND ASSET TAG PROCUREMENT
- Printers
- Scanners
- Asset label and or tags
- Scanning Hardware
- In-Built Hardware
- Client Provided Hardware

FLEET MANAGEMENT
- Excellent Arrivals Alarms
- MOT, Tyres and Servicing
- Telematics
- Lease and hire management
- Speed Aware
- Accident Management
- Geo Perimeter
- Dash Cams

WHAT CAN GO WRONG

1. LACK OF SUFFICIENT PLANNING
2. NOT GETTING EVERYONE ON BOARD
3. CARRYING OUT EXCESSIVE CUSTOMISATION
4. NO FULL-TIME CLIENT-SIDE PROJECT MANAGER
5. INSUFFICIENT FOCUS & UNDER-ESTIMATING THE RESOURCES REQUIRED
6. LACK OF PROVEN PROJECT METHODOLOGY
7. NOT INVESTING IN ROLE-BASED TRAINING
8. NO ON-GOING MAINTENANCE & SUPPORT
9. NOT DECOMMISSIONING LEGACY SYSTEMS