



ELITE[®] 3E

STRATEGIC PLANNING FOR SUCCESS

The Project Quality Model Strategy Phase



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ELITE[®]



PROVIDING A SUCCESSFUL STRATEGY FOR YOUR FIRM

Converting to ELITE® 3E™ isn't just a transfer of data. It is also an opportunity for your firm to realign processes to plan for the future. Elite's structured and tested implementation procedures ensure that the project is aligned with your business strategy and that you can quickly gain the benefits of 3E innovation.

Elite appreciates the investment in time and resources that clients make when purchasing Elite solutions. In order to protect your investment, Elite's Global Services Division uses our Project Quality Model (PQM) to ensure that your conversion to ELITE 3E is a successful one. The Project Quality Model provides Elite consultants with a process that ensures the efficient delivery of Elite solutions to our clients.

An integral part of the PQM process is the Strategy Phase, in which comprehensive analysis, planning, workshops, and documentation take place to ensure a smooth transition. This brochure explains the Strategy Phase and tells you what to expect at each stage of the process.

Elite is dedicated to providing our clients with solutions that help them face today's challenges within an increasingly competitive business environment. To accomplish this objective, Elite offers clients a comprehensive suite of implementation services. From business process consulting, solution design and specialized technical services to ongoing support, education and training, the Elite Global Services are here to help you and your firm every step of the way.



A TEAM OF EXPERTS COMMITTED TO SUCCESS



At Elite, quality client service is not just a phrase—it's a way of doing business. That's why our Global Services Division is comprised of some of the most experienced personnel in the industry. With decades of experience of working in the legal and professional services industry, our team provides a blend of domain knowledge and market sector expertise that is second to none. By using a comprehensive project management life cycle approach, we ensure our clients a successful implementation from planning to deployment.

Our Global Services Division consists of the following four consulting groups based upon their respective disciplines:

- PM** Project Management Group
- AC** Application Services Group
- TC** Technical Services Group
- CC** Conversion Services Group

THE STRATEGY PHASE COMPONENTS

PHASE II STRATEGY



Elite's world-class approach to project management, the PQM, provides a clear roadmap of the entire project and defines the overall project scope, critical production milestones, key deliverables and anticipated results.

The Strategy Phase is an integral part of the PQM process. It consists of the following six components:

Technical Strategy

Functional Strategy

Conversion Strategy

Development Strategy

User Strategy

Project Management Strategy

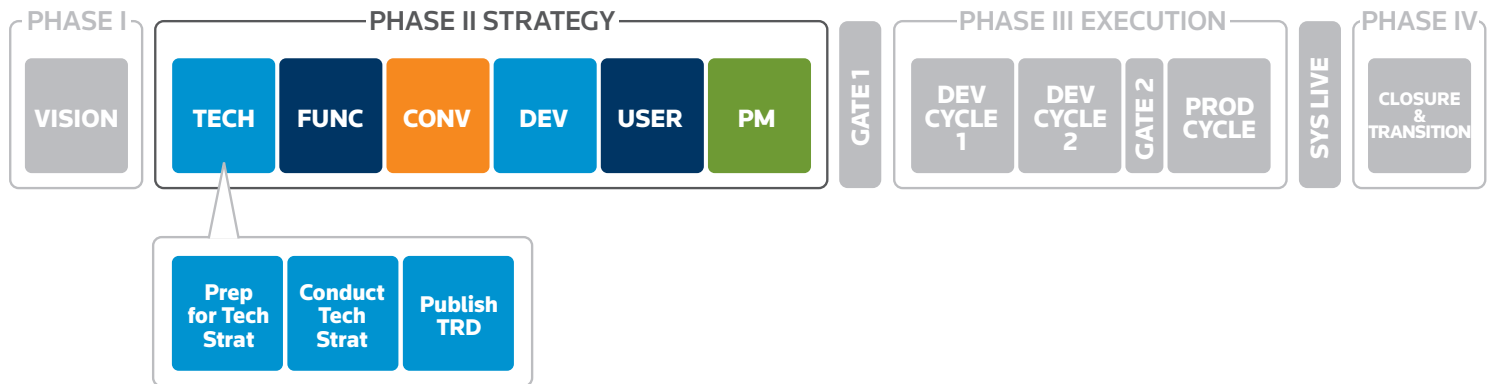
At the beginning of the Strategy Phase, Elite consultants work with your team to research all aspects of your firm and its processes in order to prepare a package of Requirements Documentation that clearly illustrates your firm's business needs for implementing 3E.





TECHNICAL STRATEGY

REVIEWING ARCHITECTURE AND SYSTEMS



In the Technical Strategy, several steps are completed to ensure that your firm’s technical infrastructure is ready for 3E.

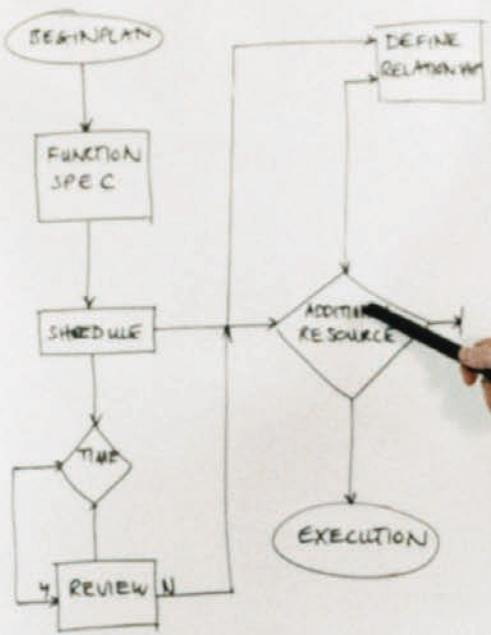
- Elite consultants meet with your staff to introduce them to the 3E framework.
- Elite consultants then review the 3E system requirements covering the following areas:
 - User base and planned usage (how many timekeepers, accountants, conflicts users) are reviewed
 - Network infrastructure (how many offices, where are they located, use of WAN acceleration technology, bandwidth latency, etc.)
 - Server configuration
 - Directory services (use of any active and remote directories)
 - Existing assets of software, licenses, data, and hardware (what is your current legacy system, how large is your financial database, how old is the data, etc.)

- Any existing hosting solutions
- Disaster recovery/business continuity planning (backup plans in the event of data loss)
- ELITE 3E virtualization policy

At the successful conclusion of the Technical Strategy, the following deliverables are provided by the Elite Technical Services Group:

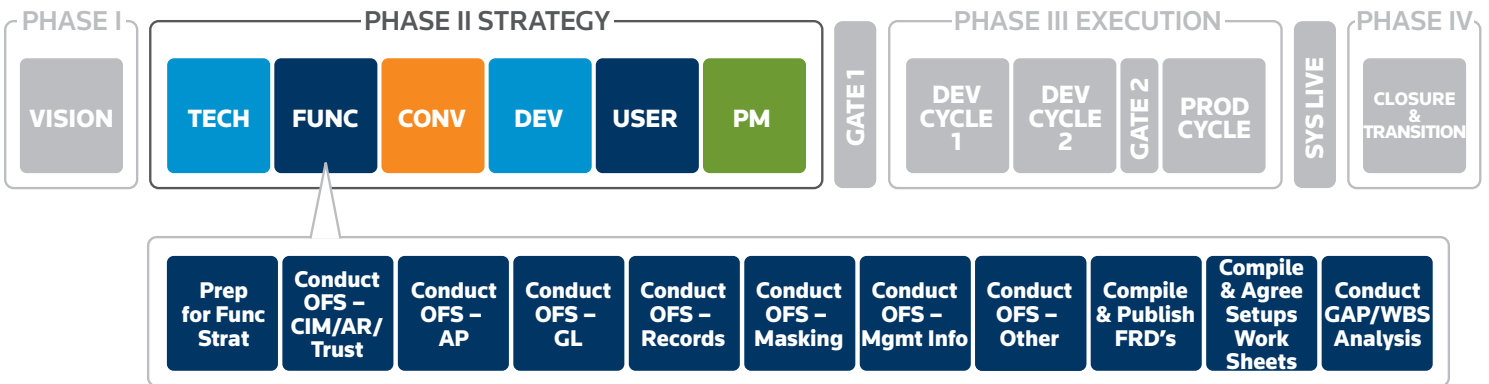
A Technical Requirements Document (TRD) consisting of:

- Development System Product System Requirements (PSRs) (for early stages of project)
- Production System PSRs (for live operations)
- 3E Deployment Matrix Sheet
- Other technical network architectural considerations



FUNCTIONAL STRATEGY

UNDERSTANDING YOUR BUSINESS FUNCTIONS



The second component of the PQM Strategy Phase consists of the Functional Strategy Sessions, which are a suite of modular-based process flow workshops designed to improve the project team’s understanding of your business and how to best position 3E in order to meet your business challenges. The workshops are comprehensive in nature, covering such modules as Client Invoice Management (Billing), Accounts Receivable, Collections, Trust Accounting, Accounts Payable, Purchasing, General Ledger, Fixed Assets, Records, Corporate Management Information Reporting and others as agreed upon.

Each modular workshop consists of the following structured program of analysis:

- Data flow
- Inbound and outbound integrations
- Data volume – existing and new
- Currencies and taxation
- Detailed process flows
- Month end procedures
- Module level reporting

Working with your finance and business teams, our Application Services Group will conduct the OFS (Onsite Functional Strategy) workshop and the agreed results will be published in a suite of Functional Requirements Documents. This documentation brings together all the “To Be” processes for your business, as well as necessary setup information, such as GL codes and so forth. This in turn is subjected to a rigorous gap analysis with the goal of building a comprehensive Work Breakdown Structure for completing the execution phase of the project.

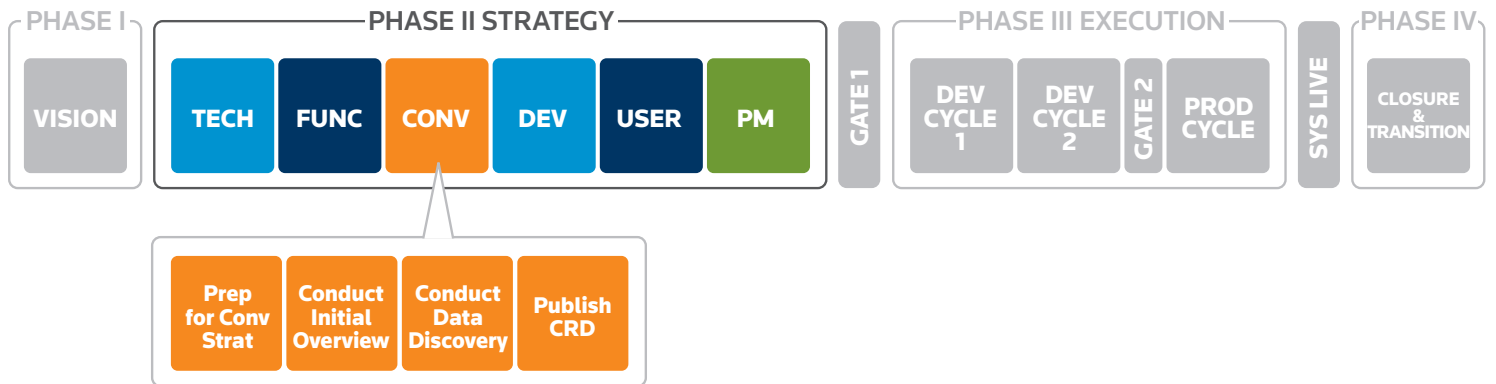
At the successful conclusion of the Functional Strategy, our Application Services Group provides you with:

- Functional Requirements Documents
- Setups Spreadsheet
- Gap Analysis



CONVERSION STRATEGY

SAFELY TRANSITIONING YOUR CRITICAL BUSINESS DATA TO 3E



The Elite Conversion Strategy is designed to develop a clear understanding of the project’s conversion goals, its duration, resource requirements and the technical challenges being faced. While all steps of the Implementation are integral to the process, the data conversion process is at the heart of the entire implementation. In order for it to be a success, Elite’s Conversion Services Group will work with your team to ensure that all parties understand their responsibilities as well as the timeline and procedures involved.

An initial overview meeting is held in order to review general conversion methodology. Team members are identified and specific roles and responsibilities are assigned to ensure optimum communication and cooperation between all of the team members.

At the end of the Conversion Strategy, the Elite Conversion Services Group will provide your team with a Conversion Requirements Document, which relays the requirements needed in order to ensure a successful data conversion.

The actual conversion activities are:

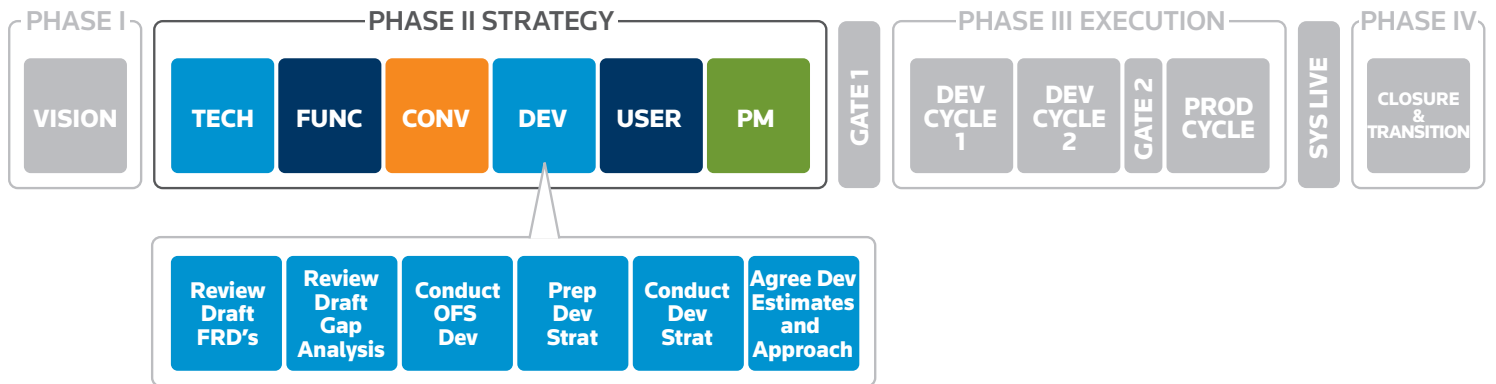
- Data mapping preparation
- Data Discovery Workshop
- Production and validation of extract
- 1st test conversion
- Data validation and system testing
- 1st test review
- Repeat above steps for 2nd test
- Go live review
- Final conversion and output

At the successful conclusion of the Conversion Strategy our Conversion Services Group provides you with:

- Conversion Requirements Document
- Data Discovery Report

DEVELOPMENT STRATEGY

TRAINING AND DEVELOPMENT APPROACH



For the Development Strategy, our Technical Services Group will work with your team in order to understand any custom requirements identified during the Functional Strategy Sessions and to agree on appropriate solutions for meeting these challenges. During these sessions, a coordinated training and development approach will be produced with a view to ensuring that all identified solutions are delivered on time and on budget, while maximizing any opportunities that may exist for the transfer of knowledge from our Technical Consultants to your IT Team.

This collaborative approach not only provides for the efficient use of internal technical resources where possible, but will also equip your IT Team with the skills needed to actively participate in the development of longer term solutions for your business, thus reducing the total cost of ownership for your firm over the lifecycle of the 3E product.

Outputs from the Development Strategy Session are:

- A Functional Development Log identifying all gaps arising from the functional strategies
- An agreed-upon development approach along with confirmation of all estimations
- A tailored training plan for your IT Development Team



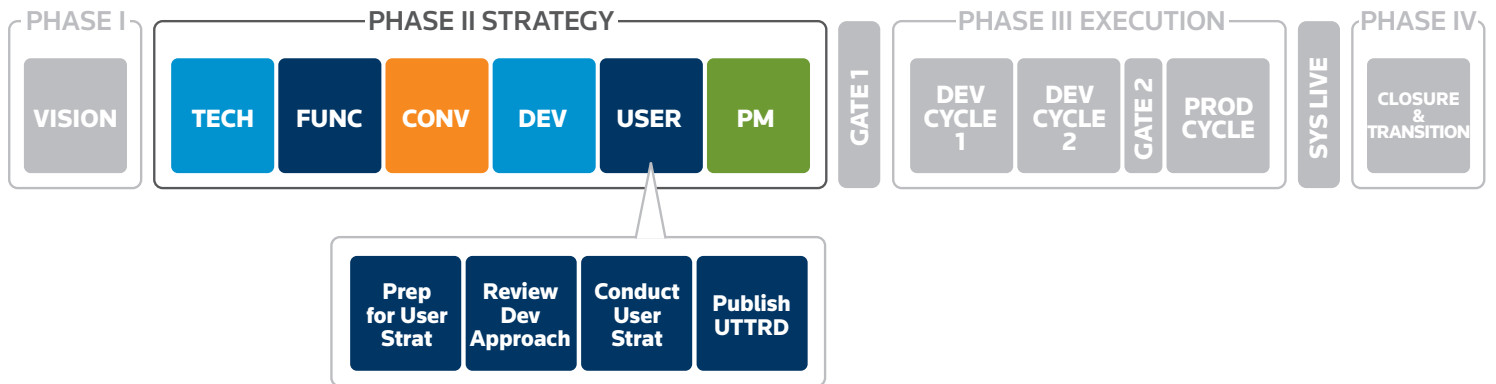
At the end of the Development Strategy, our Technical Services Group provides you with:

- The functional development log
- Training/Workshop Approach
- Development Approach



USER STRATEGY

TRAINING AND TESTING PLANNING



The User Strategy is designed to identify the various user groups within your firm in order to ensure that they receive the appropriate training throughout the lifecycle of the 3E deployment. Our User Strategy also extends to the testing of the system to guarantee that all groups have adequate opportunity to thoroughly test and verify the 3E system at both a modular and framework level before it is released into production. Once live, the User Strategy will also ensure that there is adequate support for your teams both during the initial live phases and also for the month-ends as required.

User Training

- Advanced Key Users
- Admin/Back-Office Users
- End User – Timekeepers

Technical Training

- 3E Integrated Development Environment
- Microsoft BizTalk Integrations
- Crystal templates

Testing

- Pre-conversion Test
- UAT Round 1
- UAT Round 2

Onsite Support

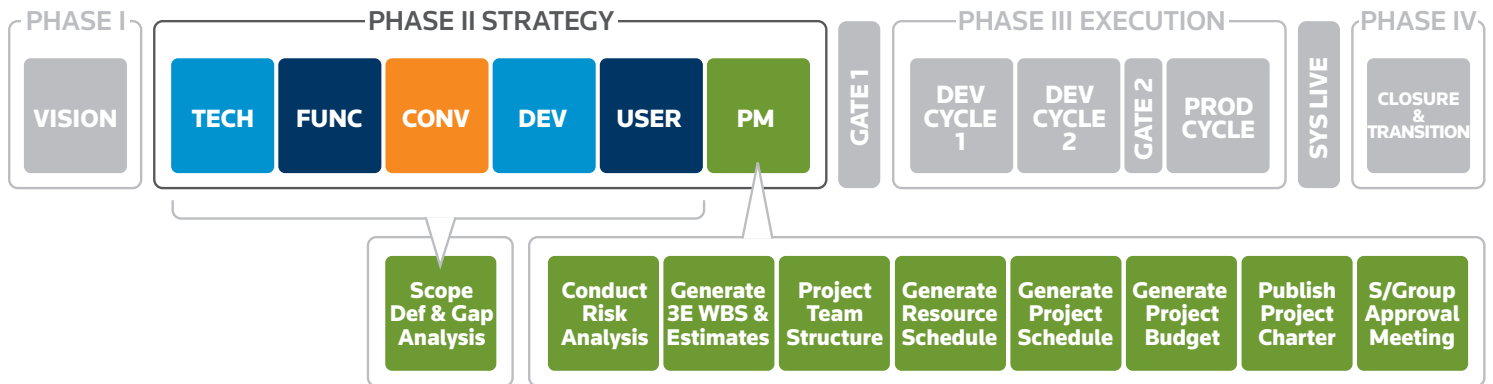
- Live applications support
- Live technical support
- Month-end support

At the successful conclusion of the User Strategy, the Application Consulting Group provides you with:

- Training and Testing Requirements Document
- Training, Testing and Support Schedule

PROJECT MANAGEMENT STRATEGY

PLANNING FOR SUCCESS



Project management is at the core of the Project Quality Model. The Elite Project Management Team and your Project Managers will work with the various teams to ensure agreement is reached regarding the planning, execution and completion of all phases of the project. These include:

- Technical Requirements
- Functional Requirements
- Conversion Requirements
- Development Requirements
- User Requirements

Based upon the above, a gap analysis and work breakdown structure will be used to prepare “bottom up” estimations for the Execution and Closure & Transition Phases of the project, in conjunction with the initial Risk Assessment of the project.

At the successful conclusion of the Project Management Strategy, the Project Management Group will provide you with:

- Updated Project Charter
- Updated Project Budget
- Updated Project Schedule





SERVICES THAT ENSURE LONG-TERM VALUE

As part of the Thomson Reuters Corporation, Elite leverages extensive technology, resources and expertise to further broaden and enhance our range of products and services. We have formed partnerships with leading companies that offer best-of-breed technologies and services in order to deliver integrated, custom solutions to our clients. For example, as a Microsoft® Gold Certified Partner, we enable seamless integration between our solutions and Microsoft platforms. It is partnerships like this that provide you with the solutions you need to automate your business processes, increase profitability and achieve competitive advantage.

Elite is dedicated to the success of your 3E implementation and to help your firm quickly move from vision to actively using your 3E solution. The sooner your firm is equipped with 3E's robust financial and practice management solutions, the sooner your firm is on its way to becoming more efficient and more profitable.



To learn more about the latest release of ELITE 3E or for a global list of office locations, visit elite.com.

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