

ELITE PROJECT QUALITY
MODEL (PQM)
A WORLD-CLASS
APPROACH TO PROJECT
MANAGEMENT AND
SERVICE DELIVERY



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Elite® is committed to providing clients with the highest quality financial and practice management solutions. In this spirit, we have developed a world-class approach to project management, based upon the internationally accepted, ANSI-standard principles from the Project Management Institute. Elite's Project Quality Model (PQM) is designed to ensure that each client receives superior service when it comes to implementing Elite solutions. Whether clients are implementing Elite products for the first time or are seeking to enhance their existing system, Elite consultants use PQM to ensure that service delivery is completed successfully and in the most efficient and cost-effective manner.

Elite PQM provides the framework for all Elite implementation, enhancement, consulting service and upgrade engagements. Under this model, each project is viewed as being composed of five distinct but interrelated processes:

These five processes cover every facet of project management, ensuring that no detail is left unattended and that the entire project is completed successfully. Overarching the entire project lifecycle, and helping to ensure the overall success of

the project, is a critical set of monitoring and measurement activities that ensure a project is stewarded to a satisfactory completion. The vision and strategy processes enable Elite consultants to coordinate and collaborate with clients during intensive sessions focused on defining and approving the overall project scope, project schedules, expected results, risk factors and definitions of success. These initial processes serve as the basis for the execution process, which puts these plans into action and ensures a highly successful engagement. Once a project is complete, the closure and transition process ensures that the project is properly concluded and turnover to Elite support is successfully accomplished.

Elite's Project Quality Model is designed to provide a clear roadmap of the entire project and defines the overall project scope, critical production milestones, key deliverables and anticipated results. Each successfully completed process creates a stronger base from which to move forward with the project. Risk management as well as schedule and cost control techniques are employed, and a communications plan is established to keep involved parties apprised of project status and progress.

MONITORING AND MEASUREMENT: A FUNDAMENTAL PROCESS TO ENSURE SUCCESS

Monitoring and measurement efforts consist of numerous cost and scope control, testing, quality assurance and acceptance activities. These ongoing activities are supplemented by critical control points that function as “gates” to ensure that the project cannot advance to the next phase until the required activities and acceptance factors are successfully met. The monitoring and measurement process employed by Elite ensures that projects are properly stewarded to both a time and cost budget. This critical process transcends across the entire project management process to help ensure on-time project completion within estimated cost parameters along with properly managed and approved schedule and scope changes. Key deliverables of the monitoring and measurement process include:

- Actual-to-budget reports.
- Status meetings and associated recap documents.
- Client signoff and acceptance letters.
- Service addendums.
- Project plan change orders.

UNDERSTANDING OUR CLIENT’S VISION

The project commences with the undertaking of the vision process. During this time, client and Elite project stakeholders come together to reach agreement on corporate objectives, key business drivers, solution expectations and the scope parameters that govern the project. At the completion of this stage, the key deliverables will include:

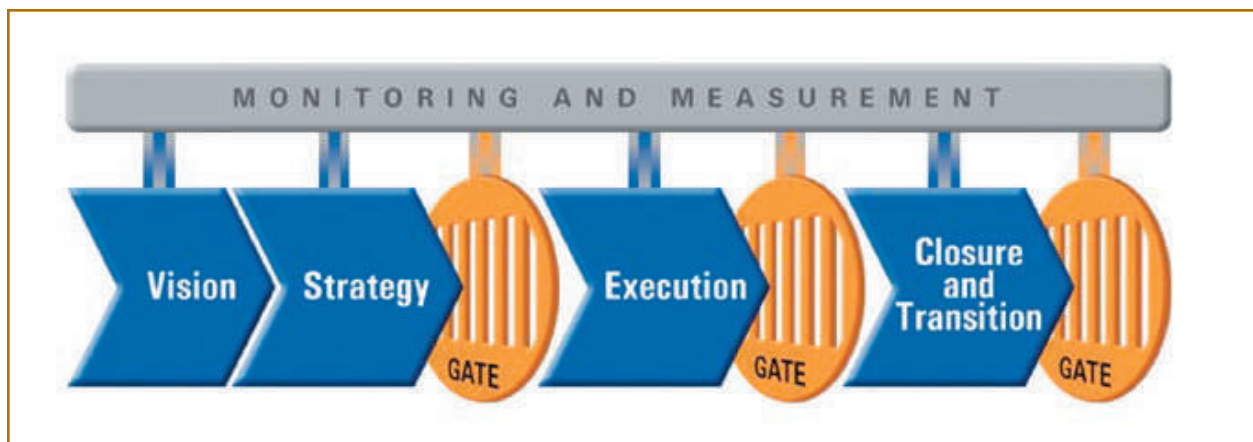
- A draft client profile document highlighting any critical intellectual property that needs to follow the project.
- A draft project charter and scope statement outlining the project purpose, project scope, preliminary resource allocations, project constraints, project assumptions and deliverables.

DEFINING A COMPREHENSIVE STRATEGY

The strategy process is of vital importance to the success of the project and can sometimes be the most time-consuming of the five processes. It is here that intense planning and strategy sessions, which define the steps needed to accomplish the client’s vision, are conducted. The organizational structure of the project team, as well as key contacts, is identified and steps for issue escalation are defined. The detailed tasks required of all parties to complete the project are identified and a project schedule developed. A communications plan, which considers all project stakeholders’ needs, is constructed. Change and project schedule control, as well as risk management strategies, are also addressed. Finally, strategies unique to the type of client project for areas such as training, conversion, software deployment, process optimization, technology infrastructure and information distribution are developed.

Resulting from the strategy process will be a clearly defined project team structure, the project framework and a detailed project schedule. It also yields comprehensive strategies to manage:

- Quality, including quality assessment and assurance.
- Project risks with proposed responses and contingency reserves identified for each risk.
- Project performance and acceptance.
- Schedule and cost control.
- Communications among all involved parties.
- Client-specific project solutions.
- A completed client satisfaction survey.



Although each client project has its own unique aspects, Elite’s Project Quality Model provides the fundamental structure and processes to manage every project undertaken through its entire lifecycle.

EXECUTION MAKES VISION A REALITY

The execution process is where the effort put forth in the vision and strategy processes bears fruit. During this process, client-specific Elite solutions are designed, assembled, configured, tested and implemented. Here, our partnership with our clients becomes even closer as we strive to ensure that they are successfully embracing their new tools and processes, and becoming increasingly self-sufficient. Whether we are implementing a software solution for a new client, expanding upon an Elite solution set for an existing client, helping clients optimize their environment, or solving a specific need with the help of our consulting services, this is where it all comes together. At the conclusion of the execution process, clients can expect the following result:

- An Elite solution tailored to their business needs and objectives that successfully meets or exceeds the defined critical success factors, solution expectations and quality assurance measures within schedule and cost parameters.

CLOSURE AND TRANSITION TO SUPPORT

In this final stage, the project management lifecycle for the project comes to an end, and the Elite solution is fully deployed and ready for use. Ownership of the solution is transferred to the client while ongoing maintenance becomes the responsibility of Elite's Support Team, which is fully prepared to assist clients in troubleshooting any future issues that may arise. Elite's Support Team members are highly experienced in helping clients achieve maximum value from an Elite solution. At the conclusion of the closure and transition process, plans are often made for future meetings and discussions regarding upcoming client requirements for additional product implementations, enhancements, optimizations or upgrades. Deliverables from the closure and transition efforts include:

- A completed client satisfaction survey.
- An updated client profile document.
- Plans for continuous improvement efforts.

CLIENT SATISFACTION – THE ULTIMATE BENCHMARK FOR SUCCESS

The development of a world-class Project Quality Model underscores Elite's dedication to its clients. Elite respects the level of trust that clients place in us when implementing Elite solutions, and the level of quality and attention to detail that is expected. With Elite PQM, clients receive superior products and services that meet and exceed their expectations.

