

ELITE IMPLEMENTATION
SERVICES
A WORLD-CLASS TEAM
AND A PROVEN APPROACH
TO IMPLEMENTATION
SERVICES FOR
ELITE CLIENTS



A WORLD-CLASS TEAM AND A PROVEN APPROACH TO IMPLEMENTATION SERVICES FOR ELITE CLIENTS

Elite® appreciates the investment in time and resources that clients dedicate when purchasing Elite solutions. Along with this investment comes the expectation that Elite products will streamline their operations and run their businesses more efficiently. To assimilate new clients into the Elite family, our implementation services team establishes a strong partnership with clients and delivers project management and technical expertise that ensures solutions are successfully implemented within an agreed upon time schedule.

Elite’s Implementation Services team of highly qualified consultants is dedicated to delivering Elite solutions that are implemented to meet or exceed client expectations. Clients benefit from the knowledge and expertise Elite’s consultants have gained from over 200 combined years of experience working in the professional services industry. As a result, Elite’s implementation team provides a blend of domain knowledge and market-sector expertise that is second to none.

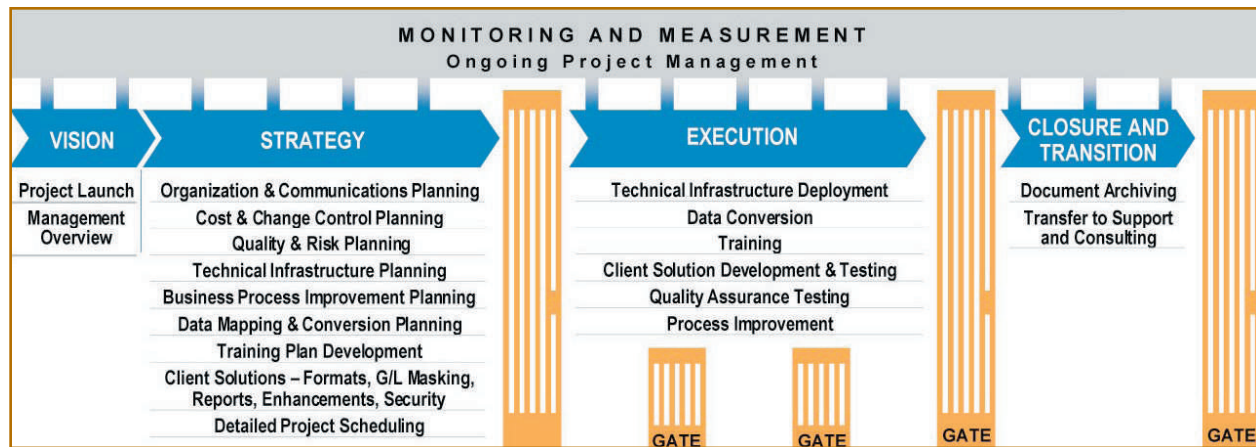
ELITE IMPLEMENTATION SERVICES TEAM HIGHLIGHTS

Elite consultants make the following key contributions to the success of an implementation project:

- Proven track record – successful implementation of more than 800 systems.
- International expertise – implementations in more than 35 different countries.
- Extensive professional services market expertise – members of the team include legal experts, CPAs, MBAs, PMPs and other professional services specialists.
- Unmatched Elite product expertise and access to Elite technical resources.

A FRAMEWORK FOR SUCCESSFUL IMPLEMENTATIONS

Elite implementations follow our Project Quality Model (PQM), a world-class approach based upon the internationally accepted, ANSI-standard principles from the Project Management Institute. Elite PQM serves as a roadmap for the entire implementation lifecycle and features a series of distinct but interrelated processes:



VISION STATEMENT

Each implementation commences by ensuring that the vision expressed during the sales cycle is carried out by the implementation team. During this process, client and Elite project stakeholders agree upon corporate objectives, key business drivers, solution expectations and the scope parameters that will govern the implementation effort. The contract details are reviewed; constraints and assumptions are documented; and technical and resource requirements are confirmed to ensure that all parties are in agreement as to the commitment required to complete the project. Subsequently, clients attend a management overview session. This session is designed to provide sufficient information about Elite's system enabling the client to make informed decisions about product configuration. At the completion of this process, the key deliverables include:

- A draft client profile document highlighting all 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.
- A management overview training session.

STRATEGIC PLANNING

The strategy process is of vital importance to the success of the implementation and can sometimes be the most time-consuming of the processes. It is here that the steps for accomplishing the client's vision are defined.

- Defining the operational structure – Initially, the organizational structure of the project team, as well as key contacts, are identified and steps for issue escalation are defined. A communications plan, which specifies the needs of project stakeholders, is also constructed.
- Managing change and cost – Change control formalizes the process by which changes to project scope are identified, evaluated, approved and incorporated into the overall plan. This is supplemented by a cost-control plan, which addresses the frequency of status meetings and actual-to-budget reporting, as well as any client-specific cost-control issues.
- Ensuring quality and mitigating risk – Quality and function acceptance criteria are reviewed and approved and test plans developed. Project risks such as customizations and enhancements, aggressive timeframes, competing projects and resource constraints are identified, acknowledged and addressed via contingency plans and reserve funds.

- Engineering the environment – The technical infrastructure and software deployment approach are detailed in a plan that covers training, testing and production environments, migration and upgrade strategies, and the management of the support and help desks.
 - Optimizing processes – Business areas, which would most benefit from process improvement afforded by the new system, are identified for further analysis.
 - Converting critical information – Data from the legacy system is mapped to its appropriate place in Elite, and the volume of data, extract plan and any unique logic associated with the data conversion are all clearly defined and documented.
 - Training client personnel – A training plan addressing end-user needs is developed and materials to support the plan are prepared.
 - Architecting client solutions – Analysis of Elite product options that allow solutions to be tailored to meet client-specific needs must be conducted. Billing formats, third-party integration requirements, G/L account masking, security and end-user access are examples of the key areas addressed. In addition, planning for the client's information distribution strategy, including reports, inquiries, and web accessible data, must be considered. Finally, if workflow, custom reports or enhancements are being deployed, specifications need to be developed and approved.
 - Creating the schedule – The results of the strategic planning effort must then be carefully documented in a project schedule inclusive of dates, timing and resources.
- The strategy process will deliver a clearly defined team structure, the project framework and a detailed project implementation schedule. The process also yields strategies to manage:
- Quality, including functional assessment and quality 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.

SOLUTION EXECUTION AND DEPLOYMENT

Execution is where the plans, specifications and strategies developed in the aforementioned processes bear fruit. During this process, client-specific Elite solutions are designed, assembled, configured 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. Some of the key activities taking place during the execution process include:

- **Technical Infrastructure Deployment** – all appropriate hardware, as well as any contract and third-party software, will be tested, installed, configured and integrated within clients' technical environment. Backup and recovery procedures are defined, and help desk and support environments are activated.
- **Data Conversion** – Client data is extracted, validated, converted and migrated to the new system environment. Conversion tests yielding validation reports, data integrity confirmations and documented run times, are performed to ensure a smooth transition to the new solution during cutover.
- **User Training** – Elite trainers, along with client resources employing train-the-trainer techniques, instruct end users on how to utilize the Elite solution to its full potential.
- **Client Solutions** – Any client-specific enhancements that need to be integrated into the Elite system, such as billing formats, custom reports, security and access specifications, and workflow solutions are constructed and tested.
- **Process Improvement** – Existing policies and procedures are analyzed and recommendations for using Elite to its full potential to optimize business practices, with a supporting deployment schedule, are proposed.

At the conclusion of the execution process, clients can expect the following results:

- 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.
- Data from existing systems will have been fully validated and converted to the new system.
- System users will be educated and trained so that clients will be able to experience immediate benefits from the Elite solution.
- Policies and procedures will be optimized so that clients can experience maximum value from their Elite solution.

CLOSURE AND TRANSITION TO SUPPORT AND CONSULTING

As the implementation effort comes to closure, the Elite solution is fully deployed and ready for use. At this time, upcoming client requirements for additional product implementations, enhancements, optimizations or upgrades are considered. Ownership of the solution is transferred to the client, product maintenance becomes the responsibility of the Elite Support Team, and Elite Consulting Services provides ongoing assistance as the client's business environment evolves and matures. Deliverables from the closure and transition efforts include:

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

ADMINISTERING THE PROJECT

Active throughout the implementation lifecycle and fundamental to Elite's Project Quality Model is a monitoring and measurement process that consists 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 implementation process to help ensure on-time project completion within estimated cost parameters along with properly managed and approved schedule and scope changes. Some of the key items that result from the monitoring and measurement process are:

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

**IMPLEMENTATION SERVICES THAT
ENSURE LONG TERM VALUE**

To provide long-term value, a financial and practice management solution must be able to fulfill the ever changing needs of a professional services firm. To accomplish this objective, Elite offers clients a comprehensive suite of implementation service offerings. With the development and utilization of the Project Quality Model, Elite's consultants are equipped with a process that maximizes the time spent with clients and further ensures the successful delivery of Elite solutions to our clients.

