

OESuite™

Generic Implementation Approach

Operational Sustainability, LLC® (OS) has a standard blueprint that it recommends for implementing OESuite™. Prior to kick-off, OS reviews the goals and objectives of a project with each client and creates a meeting agenda for a formal kick-off meeting.

OS will make every effort to conduct the work in a way that minimizes inconvenience to the client's workforce. It is imperative that the client provide adequate personnel for the team review meetings and allocate sufficient time to ensure smooth and timely completion of the project within the prescribed schedule. OS will coordinate closely with the client to establish a mutually agreeable schedule in advance of any work. Further, for unscheduled or unforeseen tasks that may arise during the project and require immediate support, OS will reasonably accommodate client personnel work schedules.

Step 1

Pre-Kick-off Meeting (1-2 hours via web conference):

OS would like to conduct a pre-planning conference call before the facilitation portion of the project commences to advise the client of the meeting agenda and to answer any questions the client may have. We will also review roles and responsibilities to avoid any potential misunderstandings.

Step 2

Kick-off Meeting (1-2 hours via web conference):

OS will facilitate a kick-off meeting to do introduction, review the scope and project timeline to finalize the schedule and to ensure that all stakeholders are identified. Prior to the meeting, the client will provide OS with a copy of its current management systems (policies/procedures) along with any required reports and metrics for future planning purposes. Based upon conversations, OS would like to get information such as policies and procedures for the relevant modules and any other information deemed appropriate by the client.

OS will provide a configuration workshop meeting agenda after the kick-off along with a revised implementation schedule. The client will provide list of personnel up front that will be attending. It's important that the stakeholders have adequate time in their schedule for the workshop.

Step 3

Workshop Preparation (remote from Houston, Texas):

OS will provide an initial high-level review of the client's management systems for the functional reporting areas being addressed by OESuite™ in this Statement of Work (SOW) to suggest potential improvements. In addition, OS will review the client's reporting requirements to determine which metrics will be utilized.

Finally, OS will arrange a remote web meeting with the client to review existing information systems in order to better gain an understanding of their existing work processes.

Step 4

Configuration Workshop (on site at client location):

OS will facilitate a configuration workshop to guide the client through optimal future work processes to get input and decisions on creating an initial blueprint for configuration, along with "To Be" Workflows (one for each module). These blueprints will serve as the basis for configuring the modules in a test environment. OS assumes that all of the roles and accountabilities will be defined during the configuration workshop as a basis for initializing the test environment. It is crucial that all stakeholders are present at the workshop to provide inputs.

OS will provide data collection templates for organizational hierarchy, users and security, checklists, and other items to initialize OESuite™ during the workshop. OS will not update the client's existing management systems (i.e., policies and procedures), only leveraging their existing systems and providing some minor suggestions to the

client for them to consider. Depending on the scope, data cleansing, historical data migration, and systems integration can be included.

Step 5

Configurations and Weekly Project Meeting (web conference):

Based on the workflow design and data provided during the configuration workshop, OS will configure and prepare the OESuite™ environment. OS will schedule weekly meetings with the stakeholders for additional data collection, discussion, demonstration of the configuration, and planning for training. It is crucial that all stakeholders are present at the weekly meeting to ensure smooth progress of the configurations.

OS will review the final configuration with the stakeholders. The client will sign off on the configuration before OS develops the training material that will serve as the basis for training for all facilities. Note that the OS hosting environment will be utilized until the client is ready to go live.

OS will work remotely with the client to support their installation of the application on a client server. The training/test environment will be set up using the backup containing the configurations, that will be used during the on-site training.

Typically, the following environments will be set up to support the implementation process:

Environment	Description
Test/ Development	Initial configuration is done in this environment. Test data will be used to test the configurations and upon sign-off, the configuration will move to Training. Revisions of the configuration will be done here based on findings from the User Acceptance Test (UAT). Once verified and approved, the configurations will go to Staging. For applying new versions of the software, the initial installation and testing will be on this environment.
Training/ Sandbox	The training environment will have the configurations and sample set up to be used during the training. This environment will also be used for User Acceptance Test.
Staging/QA	Final testing on configuration happens in this environment. Once the client has signed off on the configuration, the configuration will go live. Once new versions of the software have been tested in the Testing Environment, the new version will be enabled for a final round of testing.
Production	The actual live environment.

Duration of the Configuration step will depend on number of modules, scope, and availability of data.

Step 6

Training (on site at client location):

OS will provide training to train the trainers utilizing the training materials customized according to the workflow and data at the client's facility. Depending on the scope, we are available to perform training at individual locations with additional fee. Typical training duration will depend on the module and number of trainees.

The training date will be determined during the weekly project meeting so that all stakeholders can attend training.

Step 7

User Acceptance Test (OS oversight remotely):

Stakeholders will have access to the Training/Test Environment after the training. The stakeholders can use the environment to perform testing using actual data. The training materials can be used as guides. During the period, OS will be available to provide guidance on using the system. Stakeholders will share the findings and any changes required to fine tune the workflow and configurations.

Step 8

End User Training:

OS will perform the final modifications on the workflow/configuration according to User Acceptance Test findings. Once the final configurations are available, that configuration will be used for remaining training. Client's Trainers will train the End Users before going live. Additional End Users training can be performed after the system goes live.

Step 9

Go Live:

Once the client signs off on a move to production, OS will work with the client to set up and migrate data to the Live/Production Environment using the revised database backup or scripting. Trained users can log into the live environment to start tracking their data.

Step 10

Post-Implementation Support and Close Out:

Post-implementation support (via phone/web) is included. OS will be available during the one-month period after moving to the Live Environment. After that, OS will review the project with the client for sign-off on project closure. The number of hours available varies by project.

Generic Schedule for Implementation at “Acme” Company

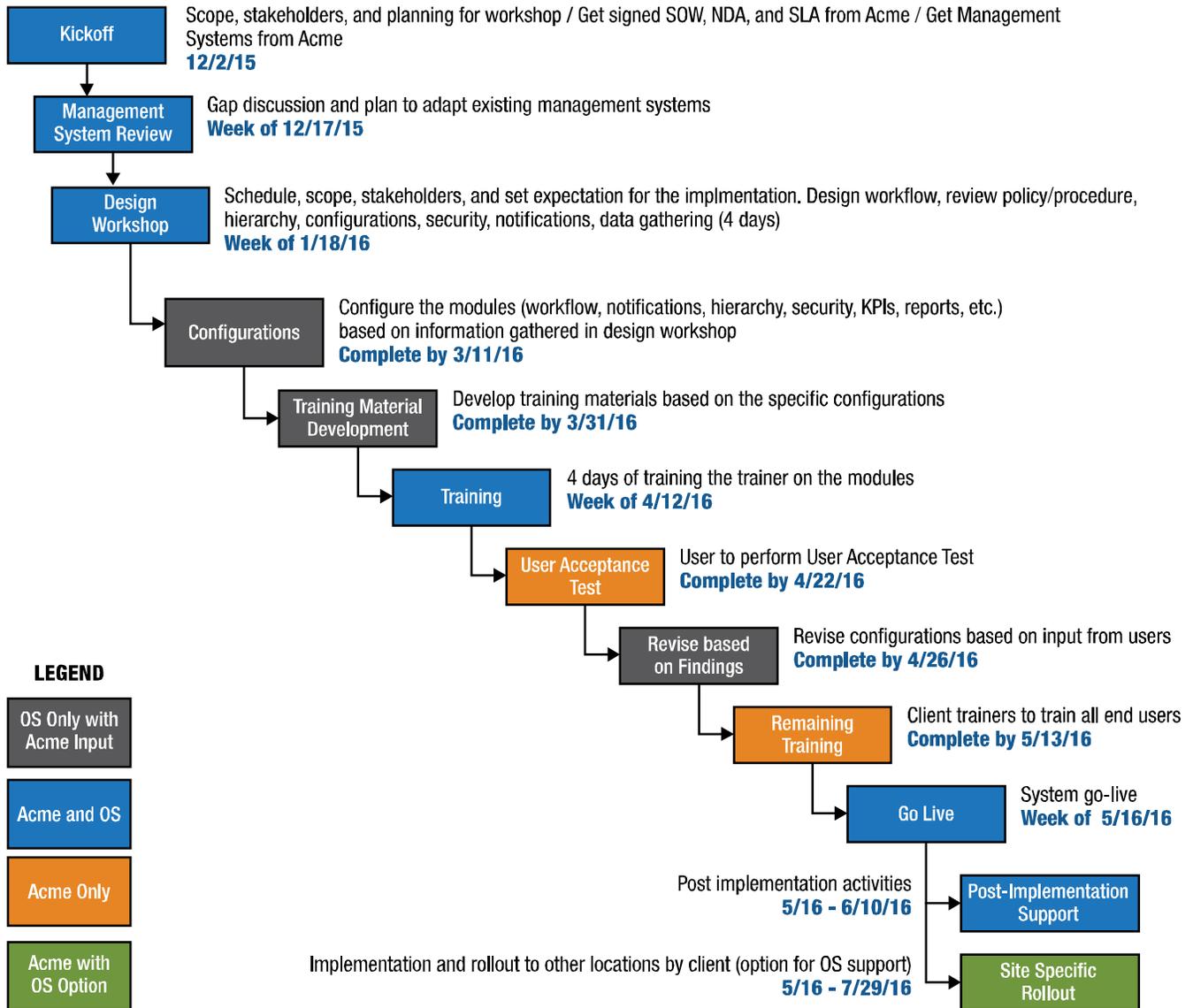


Figure 1 – Sample OS Project Plan Overview

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