

DMS Solution Implementation Methodology

9 Steps to Success

Step 1 **Project Profile**

DocuSource Sales & Professional Services engage with the customer to gather high level requirements and “align” DocuSource with the business needs of the customer.

The Project Profile is subsequently created and mutually agreed upon.

DocuSource Sales provides the customer with a high level quotation/ estimate of products and professional service hours to the customer for budgetary purposes.

Step 4 **Kick Off Meeting**

DocuSource Professional Services meets with the core project team to clearly define the work break down structure of tasks required to successfully implement the solution. Project tasks and target dates are assigned to the project team members. The DocuSource Engagement Manager will develop and manage the project plan, chair the weekly status meetings (as required) and oversee change orders/ technical issue management.

Step 7 **System Administration & Customer Training**

DocuSource creates training materials and delivers training classes for both the System Administrator and End User community. These training materials and classes are tailored to the specific customer implementation.

Step 2 **Discovery & Functional Specifications**

DocuSource Professional Services meets with the project team, including knowledge workers and subject matter experts to “discover” the detailed technical specifications required to build, implement and deploy a custom DMS solution tailored specifically for the customer.

DocuSource Professional Services will generate a Functional Specification document for customer review and approval. This document depicts the technical road map for success.

Step 5 **Systems Development**

DocuSource Professional Services designs, builds and implements the solution based on the technical specifications defined in the approved Functional Specification document and the business objectives detailed in the approved Statement of Work.

In the event a change is required that is outside the original Statement of Work, DocuSource Professional Services will execute a Change Order highlighting the required modifications and associated labor hours. Upon customer approval, the Change Order is processed, project plan is modified and system functionality is implemented.

DocuSource Professional Services develops and executes on a technical test plan to ensure the desired features and functionality are operable, based on the approved specifications. Once the DocuSource Solutions Architect is confident the system is functioning as designed, it is then released to the end user community for User Acceptance testing.

Step 8 **Customer Approval – Scope Complete**

The Customer signs off on the completion of the Statement of Work.

DocuSource Professional Services works in concert with the customer to deploy the solution in a production environment. Project is complete.

Step 3 **Statement of Work**

Upon approval of the Functional Specification document, DocuSource Professional Services will create a Statement of Work. This business oriented document clearly defines how the business problem will be solved through the application of DMS technology. Moreover, it illustrates the critical success factors, scope and boundaries of the solution that will be delivered. This document provides the customer with an accurate estimate as to the products and services required to solve the business problem as well as a high level work break down structure of tasks to complete the initiative.

Customer approval of the Statement of Work officially kicks off the project.

Step 6 **Customer Acceptance Testing**

The customer in concert with DocuSource Professional Services, develops and executes on a Customer Acceptance test plan. The End User community tests the entire scan (capture), store and document retrieval process. Moreover, document workflow and data integration are thoroughly tested during this process, if required.

As defects are encountered, DocuSource Professional Services will track and maintain a log software defects in an effort to ensure all defects are brought to a resolution. On occasion, this process may involve the software manufacturer.

Step 9 **Report Card & Case Study**

DocuSource Sales and Professional Services collaborate with the customer to document the lessons learned from the engagement. Moreover, identify areas of future opportunities and additional project phases.

Once the Report Card is complete, DocuSource will collaborate with the customer to develop a case study for industry recognition and publication. This process includes customer testimonials and metrics that can be used to illustrate the success of the project and total solution.