

WAUSAU Financial Systems' Project Management Practices

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WAUSAU Financial Systems (WFS) payment and document processing solutions are market leaders, because we understand that realizing the benefits of your business case depends on both a superior solution *and* a quality implementation. We appreciate that your implementation challenges have grown as your business needs have become more complex. You expect nothing less than the highest quality implementation of your solution.

At WFS, we deliver a best practice approach built and refined on the experience of numerous implementations. Our WFS Professional Services Team adheres to a clear set of practices to guide the implementation of our solutions, insuring the quality of your installation process. The **Project Management Practices** are customized around WFS solutions and based on industry standard project management principles and best practices.

Elements of WFS Project Management Practices

Our practices guide the project team that works with you during your solution implementation by specifying clear phases of work and team roles, that are aligned with an industry standard project management framework. Grounded in industry best practices, that stress sound project planning and management activities, our methodology focuses on high quality standards.

The **WFS Project Management Practices** are flexible to your project management needs. Our standard practices include a formal statement of work, a requirements document, a project schedule, status and issues reporting, and other tools as determined by the complexity of your project. Varied customer requirements, unique technical environments and interfaces to 3rd party software will be effectively managed and controlled within a repeatable project management practice framework.

Your solution is installed by trained personnel and transitioned smoothly to the WFS Customer Care team for ongoing support.



Project Management Lifecycle

YOUR COMPREHENSIVE PROJECT PLAN	PROJECT INITIATION	PROJECT PLANNING	PROJECT EXECUTION	PROJECT MONITORING AND CONTROL	PROJECT CLOSURE
QUALITY MILESTONES	<ul style="list-style-type: none"> ● Statement of Work ● Order Agreement ● Project Initiation Document 	<ul style="list-style-type: none"> ● Discovery or JADD Meeting ● Customer Requirements Document ● Project Schedule 	<ul style="list-style-type: none"> ● Progress and status reporting ● Regular touch point meetings ● Schedule update 	<ul style="list-style-type: none"> ● Issue tracking ● Integrated Change Control 	<ul style="list-style-type: none"> ● Delivery Acceptance ● Transition to Customer Care
INCREASED VALUE AND SATISFACTION	<ul style="list-style-type: none"> ● Project objective jointly defined and understood ● Project scope is synchronized with customer needs and expectations ● Roles and responsibilities are defined and agreed upon 	<ul style="list-style-type: none"> ● Documentation of technical specifications ● Agreement on criteria for engagement acceptance ● Validation of order components ● Expectations set for remaining project activities, target dates and resource involvement 	<ul style="list-style-type: none"> ● Facilitation of communication between WFS and customer project team members ● Visibility to project performance against budget and schedule 	<ul style="list-style-type: none"> ● Tracking, reporting and resolution of planned and unplanned project needs ● Proactive management of change requests 	<ul style="list-style-type: none"> ● Verification that deliverables fulfill project scope ● Seamless transition of customer support from implementation team to Customer Care

Project Team Roles

YOUR WFS PROJECT TEAM	PROJECT MANAGER	PROJECT ENGINEER	IMPLEMENTATION SPECIALIST	SYSTEMS ANALYST	TECHNICAL ADVISOR
AREA OF EXPERTISE	<ul style="list-style-type: none"> ✓ Solution Project Management 	<ul style="list-style-type: none"> ✓ Industry, Operations and Functionality 	<ul style="list-style-type: none"> ✓ Application Functionality and Field Implementation 	<ul style="list-style-type: none"> ✓ Operating System, PC and Networking 	<ul style="list-style-type: none"> ✓ Senior Application Subject Matter
ACTIVITIES	<ul style="list-style-type: none"> ✓ Single Point of Contact for project after acceptance of proposal ✓ Manages all project phases, including: <ul style="list-style-type: none"> ● Facilitates all project related meetings ● Reviews all tracking tools and reports ● Drives and manages communication ● Responsible for and owns project success ✓ Monitors project performance <ul style="list-style-type: none"> ● Schedule ● Cost ● Quality ● Risk indicators ● Team efforts 	<ul style="list-style-type: none"> ✓ Gathers and Reports on Customer Information <ul style="list-style-type: none"> ● Status updates ● Risk planning and monitoring ● Onsite discovery and questioning ✓ Documents <ul style="list-style-type: none"> ● Customer Requirements Document (CRD) creation <ul style="list-style-type: none"> ● Expectations ● System Requirements ● Change Control Process 	<ul style="list-style-type: none"> ✓ Configures Application and Customer Business Rules <ul style="list-style-type: none"> ● In-office configuration of base application ● Customization of customer-specific functionality ● Pre-Implementation application testing ✓ Conducts <ul style="list-style-type: none"> ● System Implementation ● Parallel testing ● Application Testing ● Operations Training ● Transition to production ● Daily status meetings 	<ul style="list-style-type: none"> ✓ Provides Networking Configuration Requirements to CRD ✓ Integration and Testing of Equipment <ul style="list-style-type: none"> ● Integration of Hardware, Software and peripherals ● Pre-Implementation testing of PCs, Hardware, Network Devices and Peripherals ● Performs onsite connectivity testing 	<ul style="list-style-type: none"> ✓ Serves Subject Matter Expert to: <ul style="list-style-type: none"> ● Drive outstanding issues to resolution ● Provide guidance and support to Implementation team ● Assist with Application Troubleshooting ● Ensure Quality Assurance prior to implementation
RESULTS	<ul style="list-style-type: none"> ✓ Project Documentation <ul style="list-style-type: none"> ● Statement of Work ● Change Control ● Issues/Action Items List ● Status Reports ● Project Schedule ✓ Project Completed to Match Client Expectations per SOW 	<ul style="list-style-type: none"> ✓ Discovery Meetings ✓ Customer Requirements Document ✓ Requirements Issues Resolved 	<ul style="list-style-type: none"> ✓ Software Configured to Meet Customer Expectations ✓ Personnel Trained in the Use of the System ✓ Issues Resolved 	<ul style="list-style-type: none"> ✓ Onsite Hardware and PC Integration ✓ Onsite Network and Application Connectivity Tested 	<ul style="list-style-type: none"> ✓ Pre-Implementation Quality Assurance Checks ✓ Issues Resolved/ Technical Assistance

WAUSAU Financial Systems' Project Lifecycle

PHASES

Comprehensive Project Definition, Planning & Design

Staging, Configuration & Testing

Implementation & Production

ACTIVITIES

- ✓ Define the Work to be Done
 - Conduct Discovery Effort
 - Clearly Articulate the Scope of the Project
 - Confirm Hardware/Software Requirements
- ✓ Create the Project
 - Identify Project Risks
 - Build Detailed Workplan
 - Confirm Project Team

- ✓ Pre-Staging/ Integration/ Testing of Equipment and Configuration
 - Load, virus scan and back-up equipment
 - Test the equipment and application with your documents and custom business rules **prior to implementation**
- ✓ End-User Training at WFS

- ✓ Validate System
 - System Testing
 - Parallel and Acceptance Testing
- ✓ Daily Project/ Implementation Team Status Meetings
 - Drive resolution of any open issues
- ✓ Best Practices Operations Training
- ✓ Migrate Test To Production
- ✓ Project Closure: Hand-off to Customer Care

RESULTS

- ✓ Formal Statement of Work
 - Expectations
 - Requirements
 - Assumptions
 - Change Control Process
- ✓ Customer Requirements Document (CRD)
- ✓ Report and Monitor Established
 - Schedule
 - Costs
 - Quality
 - Risk Indicators
 - Team Efforts

- ✓ Software configured to match customer requirements, expectations and business rules prior to implementation
- ✓ Pre-implementation staging of equipment, testing of configuration and validation of output files
- ✓ Operators understand daily processing procedures prior to implementation with training at WFS

- ✓ Efficient implementation
- ✓ Immediate discovery and rapid resolution of any open issues
- ✓ Live system
- ✓ Formal introduction and hand-off to Customer Care

VALUES

- Establishes a single contact for the duration of the project – Project Manager
- Defined and agreed upon expectations, requirements and project acceptance
- Decreased project risk
- Team committed to a successful, timely and efficient implementation
- Extensive pre-planning and collaboration to ensure a smooth implementation

- Core operations staff better prepared to operate and support system
- Better positioned for deployment - saves onsite implementation time, expense and disruption to operations
- Increased implementation quality - issues defined and resolved prior to deployment

- Quick discovery and resolution of open issues by the project team
- Smooth transition to relationship with WFS Customer Care team
- Increased confidence level of operations staff as a result of hands-on training and the smooth transition to live processing