SpringCM - Basic Setup Checklist

Professional Services: Contract and Document Management

Pre-Kickoff Activities

- Project Assignment
- Review opportunity notes from AE
- Confirm participants and any importan details about client for Kickoff with AE
- Send Welcome Email if you are an IM. BA's will have their managers send welcome and introductory email
- Add users , SpringCM Training Folders and Project Information (Package from the Basic Setup PS Account)
- 1-2 days before Kickoff, send reminder with agenda, the client has their logo for branding exercise, and list of users to add to their SpringCM account
- Update Salesforce with the Implementation Stage
- Setup Basic Setup in Rally

Kickoff Activities

- Review Agenda with Client
- Review Objectives and run through Kickoff Deck
- Training- Delivery (includes narrative for each session)
- Review and assign homework for subsequent session
- Schedule sessions
- Review what was accomplished, completed, what is left if necessary that will carry over to the next session, Questions addressed from client, and confirm next training date and time
- Update Kifkcoff deck with customer names - version the Kickoff deck in the clients account under the Project Information Folder
- Update Salesforce Opportunity Contact Roles if necessary and the stage of project
- Update Rally - time\
- Send kickoff deck link with post meeting recap, homework, next session expectations and agenda

Sessions Activities - (Repeatable)

- Review Agenda for the day's session
- Review Objectives and what will make the session successful
- Training - Delivery (includes narrative on training topics) and up sell services
- Review homework for next session

- Review what was accomplished, did we align with the session objectives? What is left that will be carried over to next session? Questions and confirmation of next session date and time
- Send post meeting email recap, homework, action items, agenda for next session
- Review summary of training content and tie in the customer key objectives- Review all up sell opportunities for consideration
- Review support channels - Support desk, Knowledge Center, Trust site
- Update Rally - time

Final Session Activities

- Review training session summary - what we delivered ; Tie in the customer objectives that were captured during kickoff and repeated during each session - Review up sell opportunities identified
- Review support and services available to customer
- Send post session email - Wrap up summary
- Update Salesforce project status and upload last session email to opportunitiy
- Update Rally - time - close project and close release