
Project Delivery (By Phase)

Initiation Phase

- **Consultation:** One hour free consultation covering expectations, Idealist Consulting Experience, what we do and how we do it. Expectations of performance and costs are established
- **Discovery Survey:** Discovery Survey sent to obtain high level requirements.
- **Estimate:** Estimate of services provided.
- **Statement of Work & Professional Services Agreement:** Assuming estimate meets clients expectations a SOW and PSA are provide for acceptance.

Requirements Phase

- **Operation Process Review (OPR):** The OPR session(s) will yield an agreed upon set of business processes and necessary configurations for the business units that will be using the application. Revised SOW may be produced. Statement of work (SOW) and project estimate is produced during this phase. This stage May include project implementation calendar.

Customization Phase

- **Rough Draft:** Basic "wire frame" of database.
- **Beta Version:** Beta version of Salesforce configuration produced from OPR.
- **Published Version:** Most recent revision of configuration. Verbal or written approval of configuration by client. Minor changes may take place after this stage.

Data Migration Phase

- **Data Migration Review:** Review legacy data for import into new database.
- **Data Migration:** The migration of data from previous database system to Salesforce. This stage includes a review of your existing before and after the data migration process. This stage is optional.

Training Phase

- **User Adoption Review:** A training review session(s) will yield an agreed upon education/training strategy for each group which will be using Salesforce. This stage is optional.
- **User Adoption:** Walkthrough of functionality in a particular segment within the Salesforce implementation. Administrator walk-through of configuration (1 to 2 hours). Salesforce courses "Administration Fundamentals" 1 & 2 required. Guidebook may be produced and delivered during this phase.

Post Launch Phase

- **Post Launch Support:** Technical consultation to assist client with the adoption of the database. This stage is optional.
- **Project Review:** Meeting attended by Project leader to discuss next phase of development.

Notes: Weekly Status Meeting may be held relative to client's needs and schedule. This weekly meeting will be attended by both Consultant and Project Leader/s to review current status of project and open deliverables. Stage delivery may vary slightly from client to client. Project Implementation Calendar may be provided as supplement.

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