

# Implementation Methodology and Roadmap

Regardless of project scope, Agiloft uses an iterative, implementation-to-deployment process, outlined in our "Implementation-to-Deployment Process" information sheet. This process is how we can deliver successful CLM solutions services—meeting our customer's individual needs. The main stages of this process have resulted in the most efficient and effective results for our clients over the past decade.



## Implementation Approach

The combination of our iterative implementation approach with the deeply configurable, no-code platform, and the well-built out OOTB CLM application, and our expert professional services team, has resulted in a 99.6 percent success rate for our implementation projects. We include consulting services as well as license fees in our guarantee.

Our iterative implementation process includes testing along the way as the different iterations are built by Agiloft implementers. We also include user acceptance testing in our projects, for testing and feedback from representative customer users. We work with our customers to create test cases and test users, run through processes, and make fixes/revisions based on testing. All background data should be imported for proper testing, along with test users. Testing subtasks include:

- ▶ Creating any inbound email accounts and test inbound and outbound email
- ▶ Customer provides spreadsheets with data for users and background tables to be imported
- ▶ Agiloft cleans up and imports users and background data
- ▶ Agiloft tests use cases with test users and make any fixes necessary

Agiloft implementations are at the configuration level, using the wizard-based admin-level interface. Custom code is not required. Prior to the "go-live," there is typically one environment. After go-live, a test/dev environment can be used with changes migrated to production. Agiloft includes sync functionality for migrating changes from one environment to another. Organizations without test/dev environment requirements can make configuration level changes directly in the production environment.



## Legacy Migration

Agiloft's import functionality provides for legacy contract data and document migration with mass uploads. Documents of all types can be uploaded and stored in Agiloft. Out-of-the-box and custom fields can be uploaded to Agiloft.

Agiloft works with our customers to understand their legacy data and agreements, and their requirements for legacy data and document migration. Depending on the best approach for our customer, we can use a combination of any of the following methods for legacy data migration:

- ▶ Direct import into Agiloft by spreadsheet or text file, along with files, which can be done in batches, at any time. Agiloft provides this service or can provide guidance for customers wishing to import on their own.
- ▶ Agiloft's AI core technology uses machine learning and AI for enhanced metadata extraction and clause library functionality. For more information, see the [Agiloft Roadmap](#). Agiloft is adding pre-built AI capabilities such as document type classification, clause risk assessment, risk analysis/scoring, and metadata extraction to automate time-intensive tasks and speed the implementation of AI-powered CLM.
- ▶ Collaboration via our network of partners, we offer "legacy load" services to upload documents and associated metadata in bulk.
- ▶ All image files will be automatically OCR scanned in Agiloft for searchability, no matter the method of migration.

In addition, Agiloft provides data migration services. The scope and cost depend on the data source, content, cleanliness, volume, and the amount of data migration preparation the customer provides. Agiloft works with spreadsheets and files provided by the customer and can also assist in the creation of the spreadsheet and files for import.

Agiloft can evaluate our customer’s data and provide options, costs, and time allowances for data migration and import the data and files.

## Implementation Plan and Timeline

Agiloft works with our customers to understand the project scope and develop a timeline. Depending on customer requirements and priorities and the scope of the project, a phased implementation may be used to meet specific timing goals or to focus on priority contract types, departments, countries, and more.

### Milestones, Phases, and Activities

Task	Subtasks
Kickoff	
The implementation specialist will manage the schedule, requirements meetings, design review, and follow-up communications to ensure a timely and smooth implementation.	<ul style="list-style-type: none"> <li>✓ Identify the Project Manager, core project team, and extended stakeholder team</li> <li>✓ Prepare the agenda and lead the initial meeting</li> <li>✓ Initial Meeting/Call</li> <li>✓ Document the initial meeting</li> </ul>



Task	Subtasks
<b>Initial Discovery</b>	
<p>Our analyst will determine the best design of tables and fields to be part of the implementation—after a thorough review of your current process, exported data is provided, and requirements about the new system have been discussed. The initial specification covers the main tables and fields to be built.</p>	<ul style="list-style-type: none"> <li>✓ The customer provides documentation of requirements, screenshots or Excel sheets with fields and data from an existing system</li> <li>✓ Agiloft reviews provided documentation</li> <li>✓ Discovery Call/Meeting to go over requirements and structure</li> <li>✓ Agiloft drafts documentation detailing the basic structure of the system to be built and the general use case</li> <li>✓ Follow-up discovery calls to go over remaining questions</li> <li>✓ Update documentation with items from the second call</li> </ul> <p>🕒 Milestone: Initial discovery complete and ready to build</p>
<b>Project Builds agreed-upon background structure for review by Customer</b>	
<p>After the initial discussion, our analyst will build out a prototype system with the basic tables, fields, and forms for the background tables.</p>	<ul style="list-style-type: none"> <li>✓ Build out all background tables, fields, layouts, searches, views based on the currently approved specification</li> <li>✓ Update specification with items from the build-out of the background structure and use case</li> </ul> <p>🕒 Milestone: Background buildout complete and ready for customer review and discussion</p>
<b>Process Table Build Out</b>	
<p>This will involve building out the process tables with additional fields and developing the process and workflows in the system to build out the defined use cases.</p>	<ul style="list-style-type: none"> <li>✓ Call/meeting to review buildout and discuss remaining process table design details</li> <li>✓ Agiloft builds out the agreed-upon process structure for review customer</li> <li>✓ Agiloft buildout all process tables, fields, layouts, searches, views based on the currently approved specification</li> <li>✓ Update specification with items from the buildout of the process structure, use case and changes from background structure review</li> </ul> <p>🕒 Milestone: Process buildout complete and ready for customer review and discussion</p>
<b>Design Review/Remaining Details (several cycles as necessary to produce the final system)</b>	
<p>Once the final design is defined, our analyst will build out the rest of the customizations, configuring rules, groups, teams, any specified saved searches, reports, views, and global variable setup.</p>	<ul style="list-style-type: none"> <li>✓ Call/meeting to review process buildout and discuss remaining automation design details</li> <li>✓ Update specification with final automation design details and changes from process buildout review</li> <li>✓ Develop buildout based on the updated specification</li> </ul> <p>🕒 Milestone: Overall buildout complete</p>
<b>Testing and Data Import</b>	



Task	Subtasks
We create test cases and test users, run through processes, and make fixes/revisions based on testing. All background data should be imported for proper testing, along with test users.	<ul style="list-style-type: none"> <li>✓ Create any inbound email accounts and test inbound and outbound email</li> <li>✓ Customer to provide spreadsheets with data for users and background tables to be imported</li> <li>✓ Agiloft to clean up and import users and background data</li> <li>✓ Agiloft to test use cases with test users and make any fixes necessary</li> </ul> <p>Ⓞ Milestone: System ready for customer general user validation</p>
<b>Customer Validation and Final Changes</b>	
After customer user testing, we will make any corrections and requested changes, provided they are within scope.	<ul style="list-style-type: none"> <li>✓ Agiloft to do a walkthrough with use cases and final review of permissions with Customer</li> <li>✓ Agiloft to make the final round of changes as requested</li> </ul> <p>Ⓞ Milestone: System ready for Go Live final preparations</p>
<b>Preparation for Go-Live</b>	
Admin and staff training will be provided, and final user guides will be created. Final as-built documentation is typically done around the time of the “go live.”	<ul style="list-style-type: none"> <li>✓ Agiloft to perform Admin handover/training</li> <li>✓ Agiloft will provide login page for users</li> <li>✓ Agiloft to prepare any required documentation of the system</li> <li>✓ Agiloft to perform staff user training with various methods</li> </ul> <p>Ⓞ Milestone: Customer Admins and Users are trained</p>
<b>Go-Live Final Actions</b>	
Final imports are done, and test data is cleansed. Hypercare is provided right after the “go live.”	<ul style="list-style-type: none"> <li>✓ Agiloft to import any remaining live or time-sensitive data</li> <li>✓ Agiloft will delete all test data</li> <li>✓ Announce to users the new system is live</li> </ul> <p>Ⓞ Milestone: System is live</p>

## Risks, Challenges, and Assumptions

The project timeline assumes the responses required from the customer will adhere to those listed in the project plan. Delayed responses or scope changes from the customer will increase the timeline associated with project completion.

Anticipated critical risks and project constraints can exist for the customer and for Agiloft. In our experience, common constraints and risks that might impact the project include:

- ▶ The availability of current requirements, processes, workflows, data elements, and other documentation is a constraint that impacts the project timeline and budget. The more readily available the documentation, the more efficient the requirements gathering phase and the less likely that new requirements will be identified later in the project.
- ▶ The number of decision makers and the efficiency in making decisions is a constraint that can slow down the project timeline and increase costs.



- ▶ The availability of customer resources is a significant constraint. Project timelines expand when information is not available when needed to continue work on the project. Projects of large scope can require dedicated resources for overall project management and for other team members at key points during the project.
- ▶ Customer infrastructure and policies can be a constraint. It is important to identify any firewall, privacy, or technical constraints so that they are considered when developing the project plan.
- ▶ Time and budget are constraints. Project scope and requirements must be a good fit with the budget and timeline. Phased launches are sometimes used for a project that is consistent with the timeline and budget.
- ▶ Agiloft performs all or nearly all implementations and project work remotely, and we do not have constraints on workspace.

Agiloft's implementation staff is in demand, but this does not necessarily mean there are resource constraints. It depends on the project and the projects already in progress when the new project is approved. Projects are assigned once the order is received, and assignments vary based on the scope and requirements of the project.

## Assumptions and Constraints

The assumptions for this project are based on the information contained in the RFP and on the fact that the scope or project criteria will not significantly change throughout the project implementation. It is also assumed that the customer will provide:

- ▶ A dedicated project manager for this project, which will allow Agiloft to focus on keeping the project on time and scope and within budget
- ▶ The appropriate technical resources as required for the various integrations detailed in the RFP.



## Team Composition

Your Sales Representative provides pre-sale support and post-sale account management. They work with accounting, implementation, support, or other departments as applicable.

For implementation projects, the VP of Service Delivery assigns resources based on the scope of the project and requirements. Customer time zones are also considered. Agiloft provides project management and implementation services typically with one to two team members based on the scope of the project. Larger projects may have more team members.

Please see Agiloft's "Implementation and Support Teams" information sheet for a description of the core implementation team members we typically allocate to a project—along with their roles and responsibilities.

## Implementation Team

Our professional, award-winning implementation team holds decades of experience providing consulting services, including project management, for a diverse range of industries and organizations, with a variety of complex requirements.

Agiloft requires job candidates to have relevant experience, excellent references, and pass a rigorous set of aptitude tests (Less than 2% of applicants pass our test criteria.). New hires go through rigorous training, project management, and implementation working with experienced Agiloft staff members—progressing to assignments of increasing complexity based on results, customer satisfaction surveys, and internal reviews.

Implementation team members are assigned to projects based on the project scope and requirements. Depending on the scope, Agiloft assigns a project manager and/or a senior implementation specialist and an implementation specialist to the project. If applicable, the project is supplemented by others, either behind the scenes or directly. Some team members may serve multiple roles.

Please see our "Implementation Staff Qualifications" information sheet for a representative list of the standard job positions in Agiloft's implementation and QA departments that could be secured and applied to a project implementation.

## Support Team

Ongoing support is provided by our Support Team, which is also managed by our Director of Customer Success. This facilitates a smooth transition from implementation to post-launch support and team coordination as applicable for support requests post-launch.

## Subcontractors

Agiloft does not typically require nor anticipate securing subcontractors to implement our customer's scope of work. Agiloft does have a network of certified platinum partners that supplement Agiloft's implementation team. With customer permission and based on project requirements such as time zone, language, specialization, and other factors, there may be occasions where using certified platinum partners is beneficial. See the [Agiloft Platinum Partners](#) datasheet.



## Customer Involvement for Success

The variance in project outcomes often rests in your hands as the customer. We have set forth a handful of implementation best practices to help you prepare for success by:

- ▶ Helping you minimize your consulting costs and the elapsed project time while ensuring a smooth and successful implementation
- ▶ Providing insight into the implementation process
- ▶ Helping you get familiar you with important project milestones and expectations

Our implementation best practices involve the following steps, before project start and during the implementation:

Before Your Project Begins	
Gathering User Requirements, Documentation, and Data	Clarify and agree on what aspects of the system are essential versus "nice to have," by detailing user needs in a requirements document and discussing it internally.
Creating a Project Team	You need a strong and consistent project team with a shared understanding of the overall project goals.
Planning for the Time Required from Your Team	We recognize that your staff might be fully committed to their day-to-day job and unavailable to provide input into the project. Let us know early; we can handle more of the data cleanup and decision-making and plan a longer and more gradual rollout.
During Implementation	
Using Meetings Effectively	Project meetings are valuable so long as the time is spent productively to move the project forward.
Refining Project Details	As the implementation phase begins, we will work together to refine your processes and clarify details about the requirements and scenarios describing how users will interact with the system in the form of "use cases."
Managing Scope Creep	It's inevitable; some new details will emerge. We include time for such contingencies in our initial consulting quote. Your Agiloft Project Manager's role is to keep the project within scope and budget by closely monitoring use cases, making updates as requirements are discovered or change, and notifying you when anything comes up that appears to be out of scope with the current quote and project use case.

We have set forth a handful of implementation best practices to help you prepare for success. For more information, see the "Implementation: Prepare for Success" document provided with this submission.



## Customer Resources

The roles and responsibilities vary for ongoing support for Hosted Service and On-Premise customers as follows:

- ▶ Hosted Service customers: Agiloft provides infrastructure and system administration services.
- ▶ On-Premise customers: Are responsible for managing the server and other infrastructure, Agiloft installation, upgrades, backups, and as applicable, redundancy.

The following customer resources are typically needed during implementation:

Customer Role	Customer Responsibilities
Project Manager	<ul style="list-style-type: none"> <li>▶ Provide project management to ensure resources and information are available as needed to keep the project on track.</li> <li>▶ Work internally with business area representatives to gather information, make decisions, and provide input to the Agiloft project manager and implementation specialist(s).</li> <li>▶ Maintain overall customer responsibility for project success.</li> </ul>
Business Area Representative(s) and Decision Makers	<ul style="list-style-type: none"> <li>▶ One or more representatives depending on organizational roles and responsibilities</li> <li>▶ Participate, as applicable during requirements gathering, demo, reviews, and user acceptance testing (UAT)</li> </ul>
Technical Staff/Legacy System Administrator	<ul style="list-style-type: none"> <li>▶ Participate as needed to supplement Business Area Representative(s).</li> <li>▶ Support legacy data export and import.</li> </ul>
Testing/User Feedback Staff Members	<ul style="list-style-type: none"> <li>▶ UAT, other testing, and user feedback</li> </ul>
Trainers/Writers	<ul style="list-style-type: none"> <li>▶ If using a "train-the-trainer" approach, produce internal procedure or training documents.</li> </ul>
Administrators	<ul style="list-style-type: none"> <li>▶ Varied based on external systems and whether on-premise</li> <li>▶ Limited participation until go-live preparation</li> <li>▶ See the "Agiloft Administrator Roles and Responsibilities" document</li> </ul> <p>When the initial project has been launched, only limited support should be needed from your administrators to maintain the configuration in Agiloft for email, AD/LDAP, user authentication, and other external services.</p>

The level of involvement for customer staff members depends on the scope of the project. Not all roles are needed consistently during the implementation. We recommend that you have at least one Agiloft administrator complete the free, online admin-level training to provide internal support after the "go-live." They





can maintain and extend the system on their own and/or work with Agiloft for additional modifications to the system, or for consulting only advice for more complex modifications and extensions.

## Getting Started






The first project meeting is typically within one to two weeks to provide time for the hosted project or knowledgebase to be set up, the implementers to be assigned, and the first project meeting to be scheduled.

Implementation does not typically begin until after at least two discovery/business process analysis calls, so the more information the customer already has available (i.e., data fields, contract types, contract templates), the faster the business process analysis will complete, and implementation can start. Agiloft can provide documents to facilitate information gathering while the order is being processed.

The average length of time of a typical implementation project can vary widely. It depends on the requirements, the project scope, and the responsiveness of the customer. Because Agiloft is a no-code system, implementation time is reduced, but our speed of implementation can only move as quickly as information is provided and business decisions are made by the customer.

## Other Implementation Resources

For a complete and comprehensive implementation package, please reference these other resources. They are embedded in the Word document and included as attachments in the PDF document.

<p>Agiloft Implementation-to- Deployment Process</p>	<p>Agiloft Implementation Staff Qualifications</p>	<p>Agiloft Implementation and Support Teams</p>	<p>Implementation: Prepare for Success</p>	<p>Administrator Roles and Responsibilities</p>
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## About Agiloft

More than 600 customers, ranging from small enterprises to U.S. Government agencies and Fortune 100 companies, depend on Agiloft's top-rated product suites for [Contract Management](#), [Service Desk](#), [Custom Workflow](#), and more. Agiloft specializes in automating processes that are too complex for competing vendors. Our best practice templates and agile technology ensure rapid deployment and a fully extensible system. For more information, visit [www.agiloft.com](http://www.agiloft.com).