

Sample client Implementation Plan

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ID	Task Name	Resource Names	Duration	Predecessors	Start	Finish
1	DEFINE PHASE		22 days		Fri 8/30/19	Mon 9/30/19
2	<i>Verbal Award</i>	<i>Sample client team</i>	<i>0 days</i>		<i>Fri 8/30/19</i>	<i>Fri 8/30/19</i>
3	<i>Contract & Credit Approval</i>	<i>Sample client team,USB Implementation Team</i>	<i>19 days</i>		<i>Mon 9/2/19</i>	<i>Thu 9/26/19</i>
4	<i>Knowledge Transfer</i>	<i>Sample client team,USB Implementation Team</i>	<i>2 days 3</i>		<i>Fri 9/27/19</i>	<i>Mon 9/30/19</i>
5	<i>Strategic Goals & Objectives</i>	<i>Sample client team,USB Implementation Team</i>	<i>2 days 3</i>		<i>Fri 9/27/19</i>	<i>Mon 9/30/19</i>
6	<i>Project Kick-Off Meeting</i>	<i>Sample client team,USB Implementation Team</i>	<i>0 days 4,5,3</i>		<i>Mon 9/30/19</i>	<i>Mon 9/30/19</i>
7	DESIGN PHASE		20 days 6		Tue 10/1/19	Mon 10/28/19
8	<i>Consult on Policies, Procedures & Best Practices</i>	<i>Sample client team,Relationship Manager</i>	<i>15 days 6</i>		<i>Tue 10/1/19</i>	<i>Mon 10/21/19</i>
9	Program Management Plan	Sample client team,Relationship Manager	10 days		Tue 10/1/19	Mon 10/14/19
10	Review Existing Policies & Procedures	Sample client team,Relationship Manager	5 days		Tue 10/1/19	Mon 10/7/19
11	Identify Program Changes	Sample client team,Relationship Manager	5 days 10		Tue 10/8/19	Mon 10/14/19
12	Communication Plan	Sample client team,USB Implementation Team	15 days		Tue 10/1/19	Mon 10/21/19
13	Identify Audiences	Sample client team,USB Implementation Team	5 days		Tue 10/1/19	Mon 10/7/19
14	Determine Messaging	Sample client team,USB Implementation Team	5 days 13		Tue 10/8/19	Mon 10/14/19
15	Determine Distribution Method	Sample client team,USB Implementation Team	5 days 14		Tue 10/15/19	Mon 10/21/19
16	Training Plan	Sample client team,USB Implementation Team	5 days 24		Tue 10/15/19	Mon 10/21/19
17	Determine Program Administrator Needs	Sample client team,USB Implementation Team	5 days		Tue 10/15/19	Mon 10/21/19
18	Determine Cardholder Needs	Sample client team,USB Implementation Team	5 days		Tue 10/15/19	Mon 10/21/19
19	<i>Determine Program Parameters</i>	<i>Sample client team,USB Implementation Team</i>	<i>20 days 6</i>		<i>Tue 10/1/19</i>	<i>Mon 10/28/19</i>
20	Program Structure	Sample client team,Implementation Project Manager	10 days		Tue 10/1/19	Mon 10/14/19
21	Determine Corporate Structure	Sample client team,Implementation Project Manager	10 days		Tue 10/1/19	Mon 10/14/19
22	Determine Account Needs	Sample client team,Implementation Project Manager	10 days		Tue 10/1/19	Mon 10/14/19
23	Determine Payment Method	Sample client team,Implementation Project Manager	10 days		Tue 10/1/19	Mon 10/14/19
24	Systems Configuration	Sample client team,Technology Consultant	10 days		Tue 10/1/19	Mon 10/14/19
25	Determine User Access Needs	Sample client team,Technology Consultant	10 days		Tue 10/1/19	Mon 10/14/19
26	Determine Reporting Needs	Sample client team,Technology Consultant	10 days		Tue 10/1/19	Mon 10/14/19
27	Determine Accounting Functionality Needs	Sample client team,Technology Consultant	10 days		Tue 10/1/19	Mon 10/14/19
28	Systems Integration	Sample client team,Technology Consultant	10 days 21		Tue 10/15/19	Mon 10/28/19
29	Accounting/Expense Systems	Sample client team,Technology Consultant	10 days		Tue 10/15/19	Mon 10/28/19
30	Determine File Needs	Sample client team,Technology Consultant	5 days		Tue 10/15/19	Mon 10/21/19
31	Determine Delivery Requirements	Sample client team,Technology Consultant	5 days 30		Tue 10/22/19	Mon 10/28/19

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32	Rollout Timeline Confirmed	Sample client team,USB Implementation Team	0 days	8,19	Mon 10/28/19	Mon 10/28/19
33	DELIVER PHASE		40 days		Tue 10/15/19	Mon 12/9/19
34	Deliver Policies, Procedures & Best Practices	Sample client team,Relationship Manager	15 days		Tue 10/15/19	Mon 11/4/19
35	Program Management Plan	Sample client team	5 days		Tue 10/15/19	Mon 10/21/19
36	Revise Policies & Procedures	Sample client team	5 days	9	Tue 10/15/19	Mon 10/21/19
37	Distribute Policies & Procedures	Sample client team	0 days	36	Mon 10/21/19	Mon 10/21/19
38	Communication Plan	Sample client team	5 days		Tue 10/22/19	Mon 10/28/19
39	Develop Communications	Sample client team	5 days	12	Tue 10/22/19	Mon 10/28/19
40	Distribute Communications	Sample client team	0 days	37,39	Mon 10/28/19	Mon 10/28/19
41	Training Plan	Sample client team,USB Implementation Team	10 days		Tue 10/22/19	Mon 11/4/19
42	Develop Training	Sample client team,USB Implementation Team	5 days	17	Tue 10/22/19	Mon 10/28/19
43	Rollout Training	Sample client team,USB Implementation Team	5 days	42	Tue 10/29/19	Mon 11/4/19
44	Program Setup & Delivery	Sample client team,Implementation Project Manager	40 days		Tue 10/15/19	Mon 12/9/19
45	Program Structure	Sample client team,Implementation Project Manager	8 days		Tue 10/15/19	Thu 10/24/19
46	Build Corporate Structure	Implementation Project Manager	5 days	20	Tue 10/15/19	Mon 10/21/19
47	Establish Payment Method	Implementation Project Manager	3 days	46	Tue 10/22/19	Thu 10/24/19
48	Build	Implementation Project Manager	3 days	46	Tue 10/22/19	Thu 10/24/19
49	Conduct Full Program Validation/Go-No Go Decision	Implementation Project Manager,Sample client team	0 days	48	Thu 10/24/19	Thu 10/24/19
50	Issue and deliver full roll out accounts	Implementation Project Manager	0 days	49	Thu 10/24/19	Thu 10/24/19
51	Systems Configuration	Technology Consultant	5 days	46	Tue 10/22/19	Mon 10/28/19
52	Build User Access Requirements	Technology Consultant	5 days	25	Tue 10/22/19	Mon 10/28/19
53	Build Reporting Requirements	Technology Consultant	5 days	26	Tue 10/22/19	Mon 10/28/19
54	Build Accounting Functionality Requirements	Technology Consultant	5 days	27	Tue 10/22/19	Mon 10/28/19
55	Systems Integration	Sample client team,Technology Consultant	30 days		Tue 10/29/19	Mon 12/9/19
56	Accounting/Expense System	Sample client team,Technology Consultant	30 days	29	Tue 10/29/19	Mon 12/9/19
57	Order File	Technology Consultant	10 days		Tue 10/29/19	Mon 11/11/19
58	Establish Connectivity	Technology Consultant	10 days		Tue 10/29/19	Mon 11/11/19
59	Test Integration	Sample client team,Technology Consultant	10 days	58	Tue 11/12/19	Mon 11/25/19
60	Move to production	Technology Consultant,Sample client team	10 days	59,57	Tue 11/26/19	Mon 12/9/19

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61	REVIEW PHASE		10 days		Mon 12/9/19	Mon 12/23/19
62	Review and Confirm Setup	Sample client team,USB Implementation Team	10 days	45,51,55	Mon 12/9/19	Mon 12/23/19
63	Confirm Successful Usage	Sample client team,Implementation Project Manager	0 days		Mon 12/9/19	Mon 12/9/19
64	Confirm Successful Payment	Sample client team,Implementation Project Manager	0 days	63	Mon 12/9/19	Mon 12/9/19
65	Review Program Setup Meets Requirements	Sample client team,USB Implementation Team	0 days	64	Mon 12/9/19	Mon 12/9/19
66	Close Existing Program	Sample client team	10 days	65	Tue 12/10/19	Mon 12/23/19
67	Transition	Sample client team,USB Implementation Team	0 days		Mon 12/23/19	Mon 12/23/19
68	Transition to Servicing Team - Meeting	USB Implementation Team,Sample client team	0 days	66	Mon 12/23/19	Mon 12/23/19
69	Program Administrator Guide Provided	Implementation Project Manager	0 days	66	Mon 12/23/19	Mon 12/23/19