Genius ERP

IMPLEMENTATION PLAN

1. KNOWLEDGE GATHERING
- Kick-off
- Business Review
- Planning

2. KNOWLEDGE TRANSFER
- Training

3. KNOWLEDGE APPLICATION
- Preparation
- Go-live
- Customer Success transition

Our method blends online and in-person training that encourages learning and application at the right pace and keeps your whole team aligned. The plan includes remote training sessions on our custom e-learning platform, as well as "shoulder to shoulder" training activities with Genius experts to make sure we understand your environment and get your team ready to launch!

Project Kick – Off ①
Business Review ②
Planning ③
Training ④
Go live Preparation ⑤
Go live ⑥
Transition ⑦
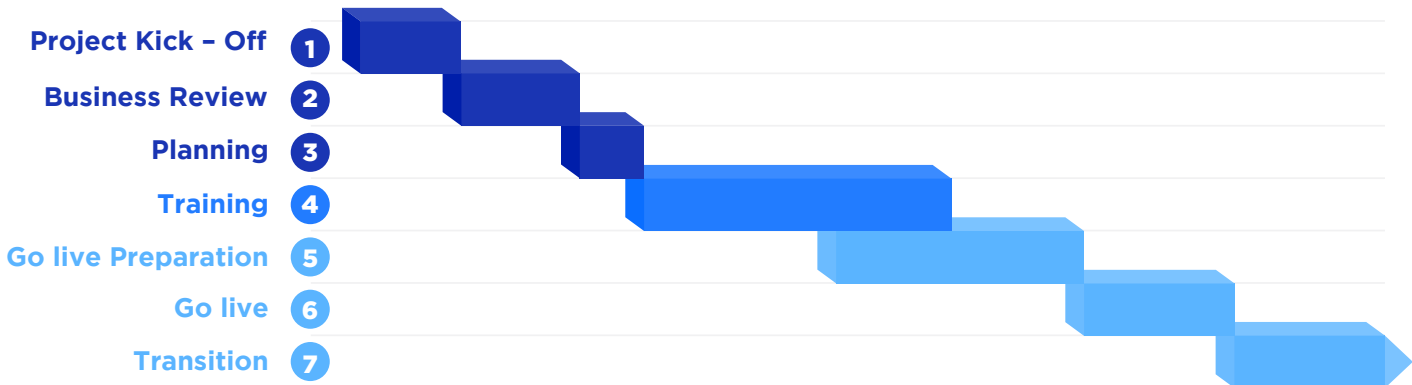
PHASE 01
Knowledge Gathering

We build a strong base by gathering as much information about your company, your business and your processes as we can at the outset. We bring your team in the loop and get everyone onboard with the project.

PHASE 02
Knowledge Transfer

Our project team conducts active training sessions to engage your team and ensure they learn Genius ERP like a pro, and can get the most out of the system from day 1.

PHASE 03
Knowledge Application

We're with you side-by-side to transition to using Genius ERP in a live environment. We'll help you iron out any kinks and guide you through your first month-end, empowering your team to use the system with confidence.

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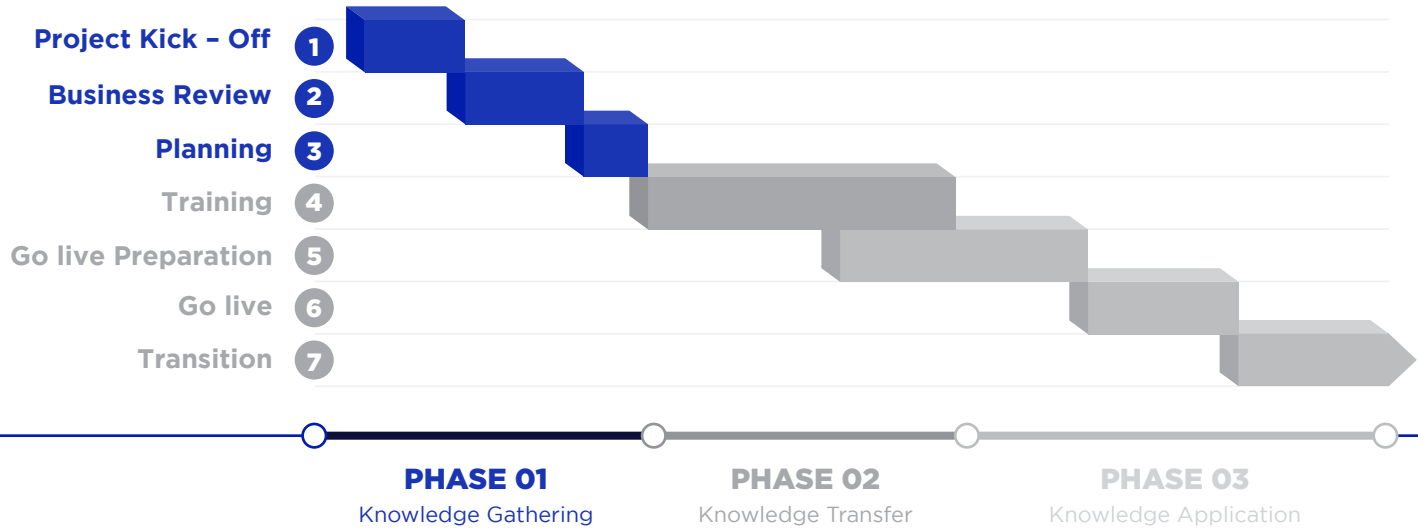**1. KNOWLEDGE GATHERING**
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Go live	6
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Knowledge Gathering

PHASE 02
Knowledge Transfer

PHASE 03
Knowledge Application

Step 1 - Project Kick - Off
Genius Solutions will be in charge of this step.

Definition
- Transfer of sales information to operations (Genius project team only): gather information from sales cycle, that includes key objectives & current pains.

Objective Outcomes
- Schedule the kick-off call
- Kick–off call with your Implementation Project manager and Business analyst.
- Presentation of your Implementation team members.
- Confirmation of the first steps with customer.
- Brief presentation of Genius Implementation Project Management Methodology.

Step 2 - Business Review
We collect all relevant information to understand your business needs and set a mutual understanding for the objectives of the implementation.

Definition Objective Outcomes
- Scope definition.
- Identify project scope and key processes to implement.
- Definition of scope: implementation strategy.
- Identify challenges and potential solutions for them.
- Important reports required.
- Identity customer's objetives.

Step 3 - Statement of Work
We determine technical and functional requirements, as well as challenge/solutions specification.

Definition
- Conduct internal meetings with implementation team to put together a Project Plan identifying clearly the potential challenges, process mapping, schedule and come up with a Go Live date.

Objective
- Create project scope of work.
- Prepare and present project plan to customer and get his approval for it.
- Have officall Go Live date.

Outcomes
- Projet Plan Sign Off
- Data migration to do list.

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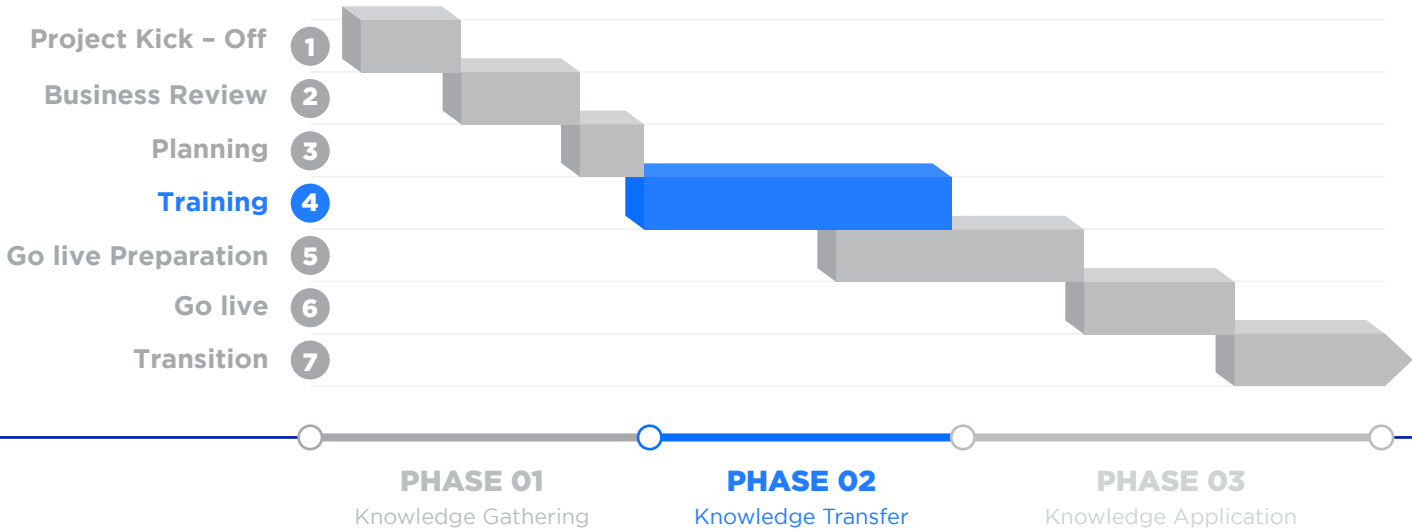
Step 4 - Training

Training is built around you. We can deliver on-site or remote training - whichever suits your team. Our goal is to build knowledge and skills in your staff so they are engaged and confident in the solution.

Definition
- Business Process definition & clarification with champion and super users;
- Documentation of frozen processes.
- Training and simulation.

Objective
- Define process for each module with champion and super users.
- Confirm, freeze, and document each process.
- Conduct first quote to cash simulation with champion and super users.
- Identify any last challenges that may come up in simulation.
- Train all users with defined processes.

Outcomes
- Frozen documented processes that are approved by all parties involved in this implementation. This gives customer clarity on the training that is required for their user and gives them a document to use during Go Live in order to reduce stress and gives more assurance for all users.
- Provide Genius document about how each module is being used for each customer. This facilitates the ramp up of any user, consultant, or support staff to understand quickly how Genius was implemented.
- Complete customer sandbox with customer data.

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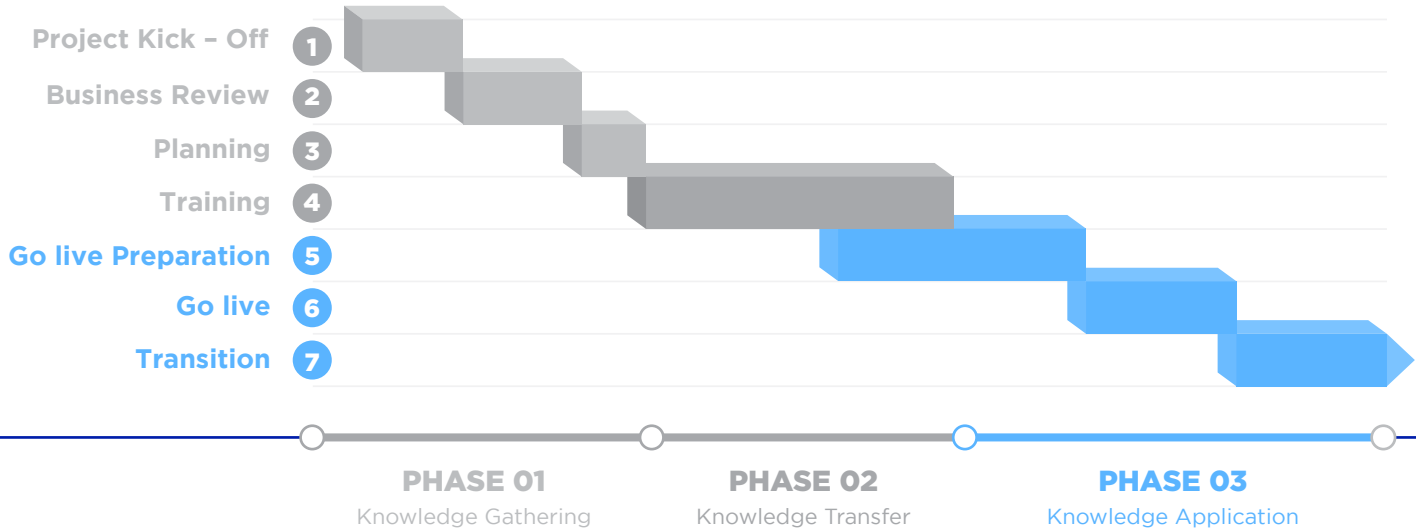**2.** KNOWLEDGE TRANSFER
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Step 5 - Go-live Preparation

Customer will be in charge of this step. Preparing & reviewing data's that will be transferred to Genius ERP, this step is there to make sure that the Live Company is ready for the Go-live.

Definition
- Steps that include user knowledge validation & data migration to Genius ERP.

Objective
- Pre Go Live simulation.
- Pre Go Live Checklist.
- Data Migration Strategy plan.
- Reports & indicators validation.

Outcomes
- Completion of all data migration.
- Data Migration checklist.

Step 6 - Go-Live

All users are now executing business processes and managing information in Genius Manufacturing

Definition
- Users coaching & support during go-live.
- All transactions are performed into Genius.

Objective
- To ensure a smooth transition.
- To reduce stress at go live.
- Help with building users' confidence.

Outcomes
- Processes execution.
- First month end.

Step 7 - Project Acceptance & Customer Success transition

All users are now executing business processes and managing information in Genius Manufacturing

Definition
- Identification of the criteria required to complete the project and any outstanding item which still need to be undertaken.

Objective
- To identify the strengths and problems experienced during the implementation in order to provide recommendation to increase the return on investment.

Outcomes
- Project Closing Report and performance on (Budget, Scope, Lead time & quality).
- Project Sign Off.