

Pre-Implementation Checklist

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Our SSI Resource Manager will be in contact soon to provide a brief overview of our Implementation process and collect some pertinent details to help ensure we assign the appropriate resources and to get an idea of your team's expectations for a go-live timeline. Once we have that information, your SSI Implementation Team will be in contact to schedule the Implementation Kick-Off conference call with you and your chosen team.

The goal of the kick-off conference call is to gain a better understanding of your business and current processes and work towards establishing and firming up an attainable Go Live date.

Please utilize this checklist to prepare for your initial conference call meeting. We look forward to working with you!

- Select key staff members to represent your company during the implementation process
 - The SSI Implementation team will work closely with your key staff members throughout this important process. Input and assistance from your key users will help ensure that all aspects of the business are considered. Designate a "team leader" from your business to represent the group in all discussions.
- Gather document examples and provide them to the SSI Implementation Team
 - Although our goal is to improve on (rather than emulate) your current system, seeing what your staff and your customers are used to helps us to better understand your business. Review the [Sample Documents](#) list and share these items with your SSI Implementation team coach prior to the kick-off conference call.
- Meet with your key staff members
 - Prior to your kick-off conference call, we suggest scheduling a meeting with your key staff members and pose the questions listed in the [Questions to Discuss With Your Staff](#) document. This step is helpful to gather staff input and reach an agreement about the needs of your business.
- View Agvance Videos and eLearning courses
 - We have selected videos and eLearning courses ideal for getting started in Agvance and provide links to each in the Welcome Center page called [Helpful Videos and eLearning Opportunities](#). Take some time to view each of these educational resources prior to your kick-off conference call and refer back to them at any time.
- Stay on track by utilizing [Basecamp](#).
 - Basecamp is a real-time communication tool that helps teams stay on track; Basecamp allows teams to track priorities and actionable items through to-do lists, calendaring, due dates, and file sharing.