



The Blue Building  
4/8 Whites Grounds  
London SE1 3LA

## Preparing for Project-base Consultancy

Pre-installation consultancy is designed to achieve the quickest and smoothest implementation of your Project-base system. It is an opportunity for KMS to understand your business and brings to bear our experience of implementing systems in a range of business types. At the end of the consultancy session, we have an agreed plan for the implementation and a finalised timetable of work.

### Key Objectives of the System

Focusing on the key reasons for implementing a new system will ensure the greatest success and acceptance by users. Typical reasons are:

- Sharing Information amongst different parts of the business
- Allowing field sales staff to work onsite or from home
- Extracting management information/reporting
- Managing the importation of 3<sup>rd</sup> party project data (such as Glenigan or ABI)
- Producing quotations
- Collecting Marketing information relating to campaigns undertaken and responses received

### Key Personnel involved in Implementation

The implementation of any new system requires certain responsibilities. Depending upon the size of organisation, a single person may fulfil more than one role.

### Common Issues

- Users – Who will have access to the software? Will they access through a LAN, Terminal Server or synchronise remotely?
- Regions – A number of functions and security settings relate to regions. These are commonly geographic areas that may be assigned to a particular branch or Salesperson. Does your organisation have an existing region structure? Is it documented?
- Security – Do you want to restrict the access of certain users in terms of what they can see or do within the software?
- Project Status - The Project Status is a key part of the tracking process. This commonly follows a Project through from being a “Lead” to “Won” or “Lost” with a number of steps in between. The number of status codes should normally be kept to less than 10.
- Quotes/Products (NB not available in standard version) – If you will be recording Quotes and Products within Project-base, do you already have a product list that can be extracted from another database (e.g. accounts)?

### Bespoke Amendments

Are there any unique amendments to functionality or data structure required in the software?  
Common requirements are:

- A bespoke layout for the ‘Project - Additional Details’ screen
- Discount functionality in Quotations

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### **Data Conversion**

Is there any existing data to be converted? Basic Office and Contact information may be able to be imported directly into Project-base. More complex data involving Projects or Events will require a program to be written.

### **Implementation Timetable**

The timetable for implementation depends on the complexity of your setup and the services you have purchased. Actual dates can vary widely, but the usual order for implementation is:

- Database Consultancy
- Installation
- Supervisor Training
- Data Conversion
- Installation of further sites/remote users
- User Training
- Crystal Report Training

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