

## Services

## Kick Off Meeting

The [Project Team Kick Off Meeting](#), which may last up to 1-day, is held at the customer's premises. The aims of the meeting are for the De Facto Project Manager to meet the Customer Project Team, to highlight all the standard project issues, to transfer any relevant information to the Customer Project Team, and to agree the Customer Project Team responsibilities.

### Project Team Kick Off Meeting Personnel:

De Facto: Implementation Consultant  
Customer: Customer Project Team Members

### Preparation for Project Team Kick Off Meeting:

De Facto: Outline Project Plan  
Customer: Organization Chart  
Sample Management Account Formats  
Customer Facing Documents  
Pricing Methods and Rules

The Kick Off Meeting will address the following areas:

### Key Business Processes / Issues:

- ▶ Discuss any previously established 'Key Objectives' of the system, as defined by De Facto, based on analysis of previous discussions and demonstrations.
- ▶ This section will also make the Customer Project Team aware of other important areas to consider, and to focus their attention on important areas within the [Training](#) Courses (e.g. pricing issues, customer structures etc.).
- ▶ Any product enhancements will be discussed and the scope of work agreed, if not previously documented.
- ▶ The Customer Project Team will provide De Facto with a definitive list of 'Key Business Processes and Issues' prior to the [Configuration Workshop](#).

### Integration Issues:

- ▶ Discuss any known integration issues, along with details related to Server, Network, PCs, Printers, Fax, Email and Web. This will ensure that the Customer Project Team understands any areas of potential conflict.

### Project Plan:

- ▶ Discuss and agree the '[Project Plan](#)' - a provisional plan based on staff availability for both Customer / De Facto will have already been submitted.

### Key Users:

- ▶ Define the areas of responsibility and expertise (if related to specific areas rather than the overall system) within the Customer Project Team.

### Training Process:

- ▶ Introduce the Customer Project Team to the 'Training Process' utilised by De Facto.
- ▶ Establish the difference between 'Key Users' and 'Other Users', (as related to the Project Plan discussion).
- ▶ Discuss Training Course aims.
- ▶ Introduce the Customer Project Team to how the training will be conducted and its objectives from a De Facto perspective.

**Chart of Accounts:**

- ▶ Discuss the use and relevance of Chart of Accounts, and explain the use of Sales Analysis v Analysis within Chart of Accounts.
- ▶ The relevant Customer Project Team member will be supplied with the standard Nominal Ledger Configuration document, explaining the Required / Compulsory Accounts, and the Excel spreadsheet for Chart of Accounts entry.

**Configuration Workshop Checklist:**

- ▶ Discuss the requirements and format for the [Configuration Workshop](#).

**Documents:**

- ▶ Discuss the use and relevance of 'Customer Facing Documents' in the de Facto system.
- ▶ Supply relevant Customer Project Team members with examples of 'Standard Documents' available within the de Facto system.

**Pricing Methods and Rules:**

- ▶ The Customer Project Team should define clearly in writing, if not already provided, the Pricing Methods and Rules.
- ▶ Consideration should be given to discount structures, promotions, special pricing, and where these apply in combination.

**Data Build Up:**

- ▶ Make the Customer Project Team aware of 'Data Build Up' requirements prior to the Training Courses and Configuration Workshop, in order to focus their attention on Data Entry, Fixed Data Imports and Opening Balance Entry / Import issues.

**Business Process Test Cycle:**

- ▶ Make the Customer Project Team aware of the '[Business Process Test Cycle](#)' requirements prior to the Training Courses and Configuration Workshop.

**Project Responsibilities:**

- ▶ Discuss the project responsibilities and update this in conjunction with the Customer Project Team. This will establish each parties responsibilities within the project.

**Project Issues:**

- ▶ Discuss 'Project Issues Document'. This document will be updated and issued following this meeting and after any subsequent training/meeting or significant actions.

**Power****Flexibility****Ease of Use****De Facto Software Ltd**

The Rutherford Centre,  
8 Dunlop Road,  
Ipswich,  
Suffolk  
IP2 0UG

[www.defactosoftware.com](http://www.defactosoftware.com)

Tel: 01473 417 200  
Fax: 01473 417 201

[enquiries@defactosoftware.com](mailto:enquiries@defactosoftware.com)