



## RMEEx - Implementation plan (Progress)

This document will keep you updated on the status of the items we have presented in our RMEEx Implementation plan. If an item is not applicable, we will indicate that with "N/A". The estimated effort applies to the work Quantrax needs to do. Your effort is not included and will be discussed in our management meetings.



Client	- <b>Northstar Companies</b>
Proposed go-live date	- <b>April 4, 2016</b>
Project Manager	- <b>Dawna Barge</b>
Development team contact	- <b>Vajira Jayawardena (Jay)</b>
Customer education contact	- <b>Debbie Collins</b>

Last updated on **Friday, January 15, 2016**

ITEM	*	Estimated effort (hours)	Due date	Percentage completed
Implement premise-based / hosted solution	*	4	01/20/16	
Data conversion	*	150	02/29/16	
RMEEx Management training	*	30	02/12/16	
Hosted or premise-based dialer set up		8	02/08/16	
Dialer integration and training		10	02/15/16	
Custom programming and new business interfaces	*	100	03/18/16	
Interfaces with 3rd party collection services (Skip, mail)		30	03/11/16	
Client remittance statement and check processing		15	03/11/16	
Clerical training – Preparation prior to install		6	03/14/16	
Set up and test payment interfaces (e.g. credit card authorization)		8	03/14/16	
Understand data and key reports		2	03/14/16	
Agent training (including training the trainer)	*	2	03/14/16	
Final conversion and on-site presence (4 – 5 days)			04/03/16	

NOTE - Items marked with an \*can be and should be scheduled for an early start

## IMPORTANT NOTES

- Data conversion specifications can take a long time. *The process must be started early*, specially when the data is controlled by another vendor
- A premise based system can take 2 – 3 weeks to be installed (iSeries hardware)
- We can set up a hosted system in 3 – 5 working days
- Mail testing must be started early because letter companies can take a long time to make changes
- Client accounts receivable balances will need to be supplied soon after the final conversion if client receivables are to be maintained on RMEEx
- Clearing of credit card and check transactions must be tested and sign-off given, early. These areas can take a long time to test and perfect
- We recommend that agents are trained fairly close to the final install (they tend to forget if trained well in advance), and that the last Friday before conversion be used to have agents “practice” on the system with the last converted data set. In larger companies we would use the “train the trainer” approach
- As a part of the training and data conversion, make sure nightly processing is run and understood
- *You must come up with your own plans to validate the data conversion and the numbers.* Run reports on your old system and compare them with the converted data for payments and commissions. These numbers will be used in your statistical reports
- Dialer training must be discussed, specially if an integrated dialer is involved. Implementation can also be time-consuming if we have problems with your PBX or circuit provider
- Quantrax’s project manager will update the implementation progress at least on a weekly basis or when there is a status change
- Quantrax would have a designated person from the development team who will handle technical work and be the point of contact. There would be a similar point of contact for customer education