



Wellington FL

Sample Ultimate CivicRec Timeline | Project Timeline

INITIATE	DESCRIPTION	NOTES	START DATE	DUE DATE
Project Initiation & Review	Project Lead will review the contract, Statement of Work (SOW) and any other documentation from the sales process. Project Lead will send initial project kickoff information to the client.		3/30/2020	4/3/2020
Kickoff Call	The Implementation Consultant will have a 1-hour kick-off call with the client to present an overview of the project and discuss other important information.		4/6/2020	4/17/2020
Project Timeline Review & Approval	The client will work with the Implementation Consultant to confirm the project timeline or make schedule change requests.		4/20/2020	4/24/2020
ANALYZE	DESCRIPTION	NOTES	START DATE	DUE DATE
Submit GL Code Import Template	The client will submit their GL Code Import Template.		4/20/2020	5/1/2020
GL Code Import	The Web Developer will import GL Codes into CivicRec.	Web Developer	5/4/2020	5/8/2020
DESIGN & CONFIGURE	DESCRIPTION	NOTES	START DATE	DUE DATE
Configuration Training	The Implementation Consultant will provide up to 2 hours of virtual training on configuration settings.		5/11/2020	5/15/2020
Submit Facilities Import Template	The client will submit their Facilities Import Template.		5/4/2020	5/15/2020
Submit Activities Import Template	The client will submit their Activities Import Template.		5/4/2020	5/15/2020
Facilities Import	The Web Developer will import Facilities into CivicRec.		5/18/2020	5/22/2020
Activities Import	The Web Developer will import Activities into CivicRec.		5/18/2020	5/22/2020
Public Page Build	The Web Developer will take the design from the client's website and apply it to the CivicRec public page.		5/25/2020	5/29/2020
Onsite Training Agenda Creation	The Implementation Consultant will reach out to the client to establish an agenda for the onsite training.		5/18/2020	6/5/2020
Onsite System Training	The Implementation Consultant will provide two days of onsite system training.		6/8/2020	6/12/2020
Facilities Training	The Implementation Consultant will train on the Facilities Module during the time spent onsite.		6/8/2020	6/12/2020
Activities Training	The Implementation Consultant will train on the Activities Module during the time spent onsite.		6/8/2020	6/12/2020
Q&A Training	CivicRec will provide up to 2 hours of virtual training as a refresher to your previous training(s) or to be used for additional questions.		6/15/2020	6/19/2020
Q&A Training	CivicRec will provide up to 2 hours of virtual training as a refresher to your previous training(s) or to be used for additional questions.		6/22/2020	6/26/2020
Q&A Training	CivicRec will provide up to 2 hours of virtual training as a refresher to your previous training(s) or to be used for additional questions.		6/29/2020	7/3/2020

OPTIMIZE	DESCRIPTION	NOTES	START DATE	DUE DATE
Confirm Test Data Clearance	The Implementation Consultant will confirm what test data will need to be cleared.		7/6/2020	7/10/2020
Test Data Clearance	The Implementation Consultant will clear all test transaction history and any users who are not listed as employees. If the client has a custom list of users to be deleted, this needs to be provided prior to this date.		7/6/2020	7/10/2020
LAUNCH	DESCRIPTION	NOTES	START DATE	DUE DATE
System Preparation for Launch Meeting	The Implementation Consultant will check-in with the client to ensure the items in the checklist are complete prior to launch.		7/13/2020	7/17/2020
Catalog Creation	Client can begin building their Activities & Facilities Catalog after System Training is complete. This should be completed before the System Preparation for Launch meeting.		6/15/2020	7/24/2020
Remove Trial Flag	The Implementation Consultant will remove the "Trial Account" verbiage from the software.		7/13/2020	7/24/2020
Setup Software Fee Service Plan	The Implementation Consultant will setup the client's service plan to initiate billing as outlined in the contract.		7/13/2020	7/24/2020
Official Launch	The client will announce the use of their new CivicRec software and make it available to citizens.		7/13/2020	7/24/2020
Project Close Procedures	The Implementation Consultant will update the client record with the appropriate notes for Support & Client Success teams.		7/27/2020	7/31/2020