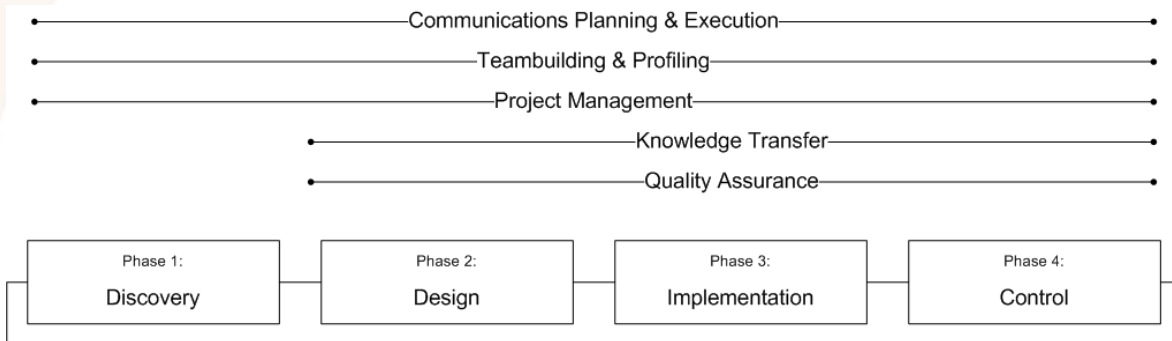


Excellence In Motion™ Intellinetics Engagement Methodology

Intellinetics' Engagement Methodology is called "Excellence In Motion", or EIM™. EIM follows best practices, including methodologies and standards set forth by the Project Management Institute designed to minimize risk, decrease costs, and ensure project outcomes meet objectives.



EIM has four Phases: Discovery, Design, Implementation, and Control. Each phase has task areas appropriate for that part of the overall document management system life cycle.

Phase 1: Discovery

The Discovery phase provides an objective analysis of your organization's document and content management needs. It can be used to determine not only your risk exposure, but also can provide the necessary data to produce your business case analysis (Return on Investment [ROI] and Total Cost of Ownership [TCO]).

Activities

- Interviews with stakeholders and subject matter experts
- Infrastructure assessment
- Review business climate and organizational goals/objectives
- Document integration requirements and technology standards

Results

- Core business drivers
- Summary of Findings
- Return on Investment review
- System management resource impact analysis

Value

- Determine tactical and strategic benefits of document management on business model
- Enable organization to advance to next stage in life cycle

The Discovery phase brings resources on-site to assess your current infrastructure and business processes. The result is a summary of findings that outlines the tactical and strategic impact of document management upon the stakeholders and respective business units that participate in the process. It also includes any relevant technical, policy, or resource constraints that must be accommodated.

The Discovery phase begins with documenting your current business drivers, initiatives and goals. This analysis forms the baseline for future planning. The Discovery Phase is supported by a combination of detailed interviews and departmental walk-throughs. If legacy systems are in place, our technical consultants will evaluate the technology in order to recommend the best integration or conversion strategy. Any key enterprise applications are also examined to determine integration points that could provide additional value to the organization.

Once the on-site portion of the Discovery Phase is concluded, the information is gathered, analyzed, and distilled into a Summary of Findings. The process concludes with a formal business presentation of the analysis and findings.

Phase 2: Design

The Design phase translates the analysis and findings from the Discovery phase into detailed system architecture and a complete Statement of Work (SOW).

Activities	Results	Value
<ul style="list-style-type: none">• System architecture design• System interface design• Detailed system configuration and design• Training Plan• Support Model• System documentation requirements	<ul style="list-style-type: none">• Analysis and Design findings• Application design documents• Hardware requirements• Business Process and Workflow diagrams• Detailed project plan	<ul style="list-style-type: none">• System design and project scope are in tight alignment with system requirements• New system will yield tactical and strategic benefits highlighted in Discovery phase• Enable organization to advance to next stage in life cycle

The Design phase is comprised of building the details behind overall system design and project planning. It focuses on accommodating the specific technology, process, and policy needs identified in the Discovery phase into a complete SOW. The Design phase concludes with an approved SOW that will support all aspects of the next phase of the life cycle: Implementation.

Phase 3: Implementation

The Implementation phase is comprised of active system delivery. The Implementation phase requires that formation of a formal project team that (ideally) remains intact throughout the entire project. The SOW produced in the Design phase guides all aspects of active delivery.

Activities	Results	Value
<ul style="list-style-type: none">• Order and configure all hardware and third-party software• Configure server, storage, and software• Equipment delivery to worksite• Installation / testing• Training• Documentation• Acceptance Testing and full cutover	<ul style="list-style-type: none">• Complete system delivery per SOW and approved changes• The solution is properly installed and integrated into business• Knowledge transfer critical to system expansion	<ul style="list-style-type: none">• Tactical and strategic benefits identified in Discovery now realized• Enable organization to advance to next stage in life cycle

The Implementation phase closes out with comprehensive system acceptance tests as well as the completion and delivery of all technical, training, and policy documentation.

Phase 4: Control

The Control phase transitions the new solution to on-going support/continuous operation mode. This phase incorporates all aspects of proactive and reactive system administration and control into organization policy and procedure. The control phase is characterized by the creation of formal feedback loops for ideas on expanded system use.

Activities	Results	Value
<ul style="list-style-type: none">• Access support and maintenance resources as needed• Create system user group to trap and build upon ideas for system expansion and/or policy revision• Participation in user community	<ul style="list-style-type: none">• Expansion of benefits through policy and system configuration refinements• New/unexpected benefits through direct end-user feedback• Gain insight into how other organizations have used their solution to solve their technical and business needs	<ul style="list-style-type: none">• Establish a mission-critical business asset able to evolve and grow• Implement new business and service models based upon new capabilities• Increase the return on system investment through continuous improvement and expansion

The Control phase forms the basis of the implementation of new capabilities now possible as a result of the new system. System expansions follow the same life cycles—discovery, design, implement, and control. This process on continuous improvement is dynamic and grows and evolves to support changing needs.

Ongoing Activity

Ongoing Activities are items that span multiple phases. Note the following summaries regarding these activities.

Communications Planning & Execution

Communications Planning & Execution is reflective of the ongoing activity practice of solid communications. Examples of tools used include:

- Project Plans and Schedules
- Meeting Agenda / Recaps
- Status Reports
- Change Control Documents
- Acceptance Documents

Teambuilding & Profiling

Account Relationship & Profiling is reflective of the ongoing process of managing the account relationship and learning/documenting everything that we learn. Tools used during this process include the Intellinetics Customer Profile, and Intellinetics Contact Profile forms.

Project Management

Project Management is the process of managing the On-Time, On-Budget, and Client Satisfaction aspects of the project. Tools used within Project Management include:

- Client Status Communications
- Scope and Change Control Documents
- Project planning templates and processes
- Techniques advocated by the Project Management Institute (PMI)

Knowledge Transfer

Knowledge Transfer is the art of transitioning the process and technology knowledge associated with our solution to the client. It not only involves specific training-oriented events, but it involves solid day-to-day communications with the client. Tools used within Knowledge Transfer include:

- Training courses
- Software documentation
- Expert support staff and consultants
- Opportunities for continuing advanced product and process education

Quality Assurance

The focus of Quality Assurance is to ensure quality deliverables throughout the design, testing, and implementation phases of the project.

- Standardized delivery processes
- Solution documentation and acceptance mechanisms
- Detailed Statement of Work
- Quality *planning* instead of quality *testing*

Learn More Today

If your organization is interested Intellinetics Engagement Methodology, please contact us to learn more about how our professional services team can help chart your course to successful document management.



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