ASAP Implementation Plan

Prior to Kickoff

The ASAP implementation process begins with a Kickoff Call between you and your Client Services Specialist. The goal of this call is to make sure that your CSS understands the basic needs and workflows of your organization so that they can help make some decisions around system configuration.

What can you do to prepare for implementation prior to your ASAP Kickoff Call?

- Review the project Basecamp account – we use Basecamp to manage all project communications and your account contains links to instructions and support documents required for our set up.
- Clean up the data that you want to import into ASAP. This is a good time to update your customer data, weed out old or duplicate records, refresh staff records, etc.
- Gather core data for the upcoming 12 months including:
    - Key Dates – Holiday, Semester and Fiscal Year
    - Financials – Tuition, registration fees, payment plan fees, Financial Aid or Discounts
- Meet with Finance staff and gather any questions or concerns. Try to get samples of their most important reports
- Meet with web and marketing staff and discuss how the ASAP system will best live with your website online. Find out if there are any upcoming branding or image issues that must be considered.
- Review your current workflow for routine administrative processes that will be handled in ASAP. Now is a good time to make changes if necessary.
- Review your calendar and identify times your team will have other commitments.

Stage One - 1 week

Milestone - The Kickoff Call

The Kickoff Call should involve your project manager and any key staff members. It will provide a macro-level view of the project and drill down to some core details and milestones.

- Core understanding of organization structure, services, and workflows
- Review the implementation process and plan, and verify schedules and dates
- Review the data to be imported into the Import Data Template and set due dates
- Walkthrough Basecamp, the project management tool used during the implementation process
- Identify project milestones e.g. data import, online reg site, live date

What you're focused on in Stage One

In Stage One your primary focus is about gathering data and project planning.

- Fill out the core configuration data template (locations, rooms, staff, etc.). If you have purchased an expanded import, complete student import template also.
- Confirm milestone dates and assign work to staff accordingly

In Stage One our primary focus is on building the structure and configuration to best support your needs in the system.

- The CSS will take information from this discussion to the team and discuss best configuration options as a group.
- Core system configuration

Status Calls

The status call is designed to give you a set time each week to ask questions that have come up since the previous week's call. While you can always use Basecamp messages to ask questions when you're stuck, this is really your forum for asking general questions.

Your CSS will set a basic agenda but these calls are really designed to be driven by your needs. So to make the most of these it's a good idea to compile a list of questions and topics that you want to review and to send them to your CSS prior to each week's call. That way they can be better prepared to answer questions directly during the call.

Sample agenda from an actual week 1 status call:

- Address questions on the data to be imported and schedule import times. It is important that you can look at the imported data as soon as it is completed to ensure accuracy.
- Review Program, Course Groups, Courses and Classes structure
  Address questions on transferring existing manual workflow to its automated place in ASAP

Stage Two – 1 to 2 weeks

What you're focused on in Stage Two

In Stage Two your primary focus is usually still about data.

- Core data – rooms, faculty, sites
- Class data – naming conventions for course and class
- People data – customers, staff, faculty
- (PL or module-specific data)

It is also important that you do your homework prior to your first training session, to make sure you get the most of your time with the trainer. This week your homework is usually:

- Watch the Registration Form and Waiver videos
- Read articles on the ASAP Support site as suggested in your Basecamp Project

Training #1 – Registration Forms, Waivers and Course structure

A part of your weekly status call may include training or you may have that separately with one of our Trainers (who is briefed on your project). These trainings cover core topics and are based on your particular needs. In Stage Two, we work on functions that do not require your data. Examples of Training schedules include:

- Registration and PL Inquiry Forms if applicable
- Waivers
- Program, Course Groups, Courses and Classes structure for data template

After your training you will set up your Forms and Waivers in ASAP.

You will also be working on moving the ball forward on these processes:

- Selecting a payment processing provider

What we're focused on in Stage Two

This week we'll be working to finalize your base ASAP system and if we have your class data we'll begin that import process as well.

In addition, we're usually working on:

- Online Registration Website
- Preferences and configuration

Weekly Status Call

Don't forget to send your CSS some agenda items and questions for this week!

- Review data import and resolve challenges
- Review Forms and Waivers you created after your training

Stage Three – 1 week

Milestone – Data Import
By this time some, if not all, of your data will have been imported.

Weekly Status Call

Don't forget to send your CSS some agenda items and questions for this week!

- Data Import review – we will ask you to confirm that the data imported is in correctly
- Review internal launch plan and discuss with any impacted departments such as finance, marketing and student services

Training #2 - Registrar Training!

This training will cover all routine tasks that may be performed by Registrars and Student Services staff including:

- enrolling students in classes
- creating, editing and managing student and family accounts (including their account on your ASAP public website)
- transferring students from one classes to another
- cancelling and refunding

What you're focused on in Stage Three

Your primary focus is:

- Familiarizing yourself with your data in the new system
- Completing data import and checking it for accuracy.   It is crucial that data is reviewed soon after it has been imported as it is difficult and time-consuming to change after it is being used and may incur additional costs
- Establishing and configuring Time Periods, payment plans, registration fees
- Public Site – review content, upload images, work with your web staff to plan a smooth customer journey from your website to the ASAP site.

You will also be working on moving the ball forward on these processes:

- Testing credit card payments

What we're focused on in Stage Three

We'll be working to finalize your base ASAP system and finalizing any data imports remaining.

In addition, we're usually working on:

- Online Registration Website – any final configuration or layout changes
- System configuration

Stage Four – 1 week

Milestone – Testing

Once all your data is imported, you and your team will begin testing it by creating test accounts and making test enrollments.   This could include live enrollments in one or two small classes by some willing customer testers.

Weekly Status Call

Don't forget to send your CSS some agenda items and questions for this stage.

- Review Launch Plan
- Review the key reports and work with Finance staff to ensure their needs are covered

Stage Five – 1 week

Milestone – Launch

With all your testing complete, links between website and ASAP site created, it is time to launch your site.

We will work with you to monitor the first few days and once all is running as planned, we will pass you to our Support Services team.