

# Project Success with ACDI

As a valued partner, the purpose of this guide is to allow you insight into the standard operating procedures of ACDI's Project Coordinating Team. This will equip you with the knowledge needed to set the proper expectations with all current and future clients in regard to Project Launch, Kick-off calls, Installation and Administrative Dashboard Training.



ACDI takes our partnership seriously and will make every effort to make you wildly successful, which in turn translates to success for your current and future clients. We look forward to assisting you with your journey!

## PROJECT LAUNCH

Upon receiving your processed order, your assigned Project Coordinator will launch the project via email. This email will include a request for a list of stakeholders, both from the reseller side as well as the end user side to include:

- Name
- Phone
- Title
- Email

Once this information has been received, your Project Coordinator will contact the entire project team to describe the purpose of the kick-off call as well as offer a specific time for this call. All proposed times must be confirmed within 24 hours. Upon confirmation, your Project Coordinator will send out an invite to all reseller provided stakeholders.



## KICK-OFF CALL

**Definition:** A short call to ensure that all parties understand the software/network requirements for the installation as well as the specific configuration that will be developed for your organization.

Participation of the reseller, the end user and their IT is mandatory.

Once the kick off call is complete, your Project Coordinator will provide a recap including prerequisites, a rollout plan, and proposed dates for installation. The proposed dates for install must be confirmed within 24 hours or the time held will be released and we will look for an alternative time.

Also included in the follow up is a dealer/end user checklist which must be completed prior to the installation. Common items to be included in the checklist are:

- Ensuring the server requirements have been met
- Devices online and printing
- Print queues set up on the Application server
- All project related devices and printers have the latest firmware and any device specific requirements installed.



## INSTALLATION

Once the installation date(s) have been confirmed, invites will be sent to all stakeholders.

The installation invitation will include instructions for dialing in and instructions to gain remote access to the end user environment. The end user IT must have administrative rights to the server to allow our engineer access during the session.

Reseller and end user participation is mandatory for all installation sessions, preferably with a reseller technician onsite to assist at the device panel if needed.

Our Professional Services Engineer will then conduct the installation according to the previously presented rollout plan that aligns with the order received.

Upon conclusion of each installation session, your Project Coordinator will follow up detailing all items accomplished, items remaining, and a proposed time to re-engage for additional sessions (if required).



## ADMINISTRATIVE DASHBOARD TRAINING

Your project is almost complete! Our final step (if needed), is to have our installing engineer conduct an administrative training session.

This session is usually geared towards the individual who will be administering the product in the clients environment.

## COMPLETION & CLOSURE

Congratulations! Your project is now complete! Once all elements in scope have been successfully implemented, your Project Coordinator will follow up with all stakeholders via email, indicating your project is complete, along with a satisfaction survey that we encourage you to fill out. By doing so, you play an integral role in helping us refine our processes.

However, if you are experiencing any issues, please let your Project Coordinator know so steps can be taken to mitigate any lingering issues. Upon formal closure of your project, your end user will be provided with the necessary information to contact our Awesome Technical Support Team should an issue arise in the future.



**Pro Tip:** Until your project is complete (5 day steady running state), your Project Coordinator will remain your primary point of contact. Contacting our Support Team on an Open project will redirect the dialogue & issues to your Project Coordinator, who will then schedule time with the Professional Services Engineer who performed the installation. We take Time-to-Value very seriously and want to assist you in the most efficient manner possible.

## INSTALLATION ROADBLOCKS

The goal of any software is to maximize efficiency while utilizing new technology. It's the reason we are all here! With that being said, we'd like to identify some of the most commonly encountered issues experienced during a project. Only with a thorough understanding of these issues can we utilize our partnership to make this a best-in-class experience!

- The right representation and timely attendance of both client and reseller during all calls
- Proper communication of expectations to end users
- Less than seamless remote connectivity to the client environment
- Server requirements not being met
- Devices not being ready in regard to connectivity
- Devices not having the latest firmware or any device specific requirements installed
- Print queues not created and drivers not installed