SchedulePro Implementation Process & Client Requirements

Onboarding Package	Starter	Enterprise	Enterprise Plus
Typical Time to Go-Live	9-10 weeks	11-12 weeks	13-14 weeks

Executive Sponsor	*Project Manager*	*Site Focal Point/ Subject Matter Expert(s)*	*Integration Specialist*	*End User Trainer*
As needed throughout project	1-2 hours/week throughout project	4-6 hours/week throughout project	2-3 hours/week throughout project	4-16 hours/week in training phase
Provide solution vision, decision authority and change leadership	Drive project timeline, decisions, and deliverables	Provide scheduling rules, workflows and setup data. Act as SchedulePro administrator when live	Prepare data from and potentially integrate with your current HCM and WFM systems	Attend supervisor training and train future end-users

After an introductory leadership call to confirm objectives and timelines, we will gather the key functional and integration requirements and the base schedule data needed to begin the discovery and configuration phase of the project and setup your SchedulePro instance.

We introduce the full project teams, establish timelines, stakeholders, ROI benchmarks and project objectives. From there, we formalize project goals and timeline in a project portal for team collaboration and launch.

Client Requirements

- Project and Business Goals
- Project Stakeholders
- Project Scope
- Timeline
- Rules and Workflow Needs
- Job and Position Assignments
- Employee Lists, Shift and Shift Patterns
- Daily Assignment Requirements

02 Discovery & Configuration

2-3 weeks

Through collaborative working sessions, our team gains a complete picture of your as-is scheduling processes and your functional requirements. Your rules and processes are configured so you can see them in SchedulePro. Any needed system integrations are designed following industry best practices.

User adoption plans are agreed upon, along with the usage metrics that will confirm the ROI that your organization will derive from SchedulePro.

Client Requirements

- Scheduling Policies
- Fatigue Rules
- Integration Designs
- Work Rules
- OT Equalization Policies
- User Adoption Plan

03 User Acceptance Testing

2-3 weeks

Once the initial system configuration process is complete, it is time for systems and user acceptance testing (UAT) to fine-tune your solution. We walk through specific business scenarios to validate the system and ensure we deliver what was agreed upon. Detailed plans and materials for change management communication and user adoption are prepared during this same period.

Client Requirements

- Test Team
- Critical Test Scenarios
- Performance Benchmarks
- Acceptance Goals
- Feedback & Re-test

04 Training and Change Management

2-3 weeks

We deliver a scenario-based scheduling training session for supervisors, doubling as a train-the-trainer class for trainers and other key users. We offer employee training videos and systems training for administrators.

To enhance the learning experience, we also provide on-demand, online access to training through our Learning Management System (LMS). This allows all users to engage in self-paced learning, empowering them to learn at their own convenience.

Client Attendees

- System Administrator(s)
- Scheduling Supervisors
- End-User Trainer(s)
- Internal Helpdesk

05 Launch and Go-Live

1-2 weeks
+ 4 weeks production hypercare

During cutover, we load current employee data and opening balances into SchedulePro. Then, it's go-live time! Your schedulers start creating schedules for employee access. Launch events and workshops assist employees in using SchedulePro.

The hypercare period ensures a smooth transition from onboarding to production, with ongoing support. The last step is the official handoff to our support teams, who provide continuous scheduling assistance.

Client Requirements

- Cutover Plan
- Launch Event
- Ongoing Hypercare Refinement
- Transition to Production Support
- Focal Point Takes Reins Internally