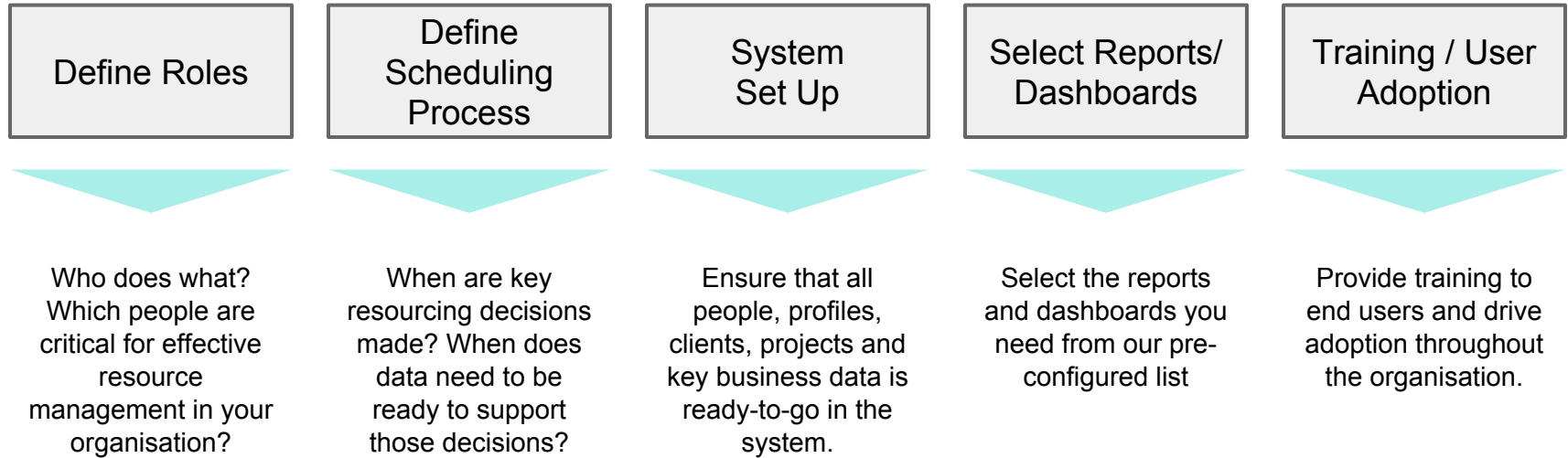


Precursive Quick Start

5 Steps to Success

Five Steps to Precursive Success



Define Scheduling Process

For most companies there are multiple stakeholders that are essential to effective resource management. Precursive recommends a combination of key roles be set up, although one person may hold multiple roles.

Scheduler

Responsible for managing scheduling grid, conflicts and resource requests

Time required:
Variable

Reporter

Prepares reports to enable data-driven decisions on resourcing. Responsible for data cleanliness.

Time required:
1-2 hours
p/w

System Admin

Sets up users and controls permissions. Deals with access problems, training and engagement

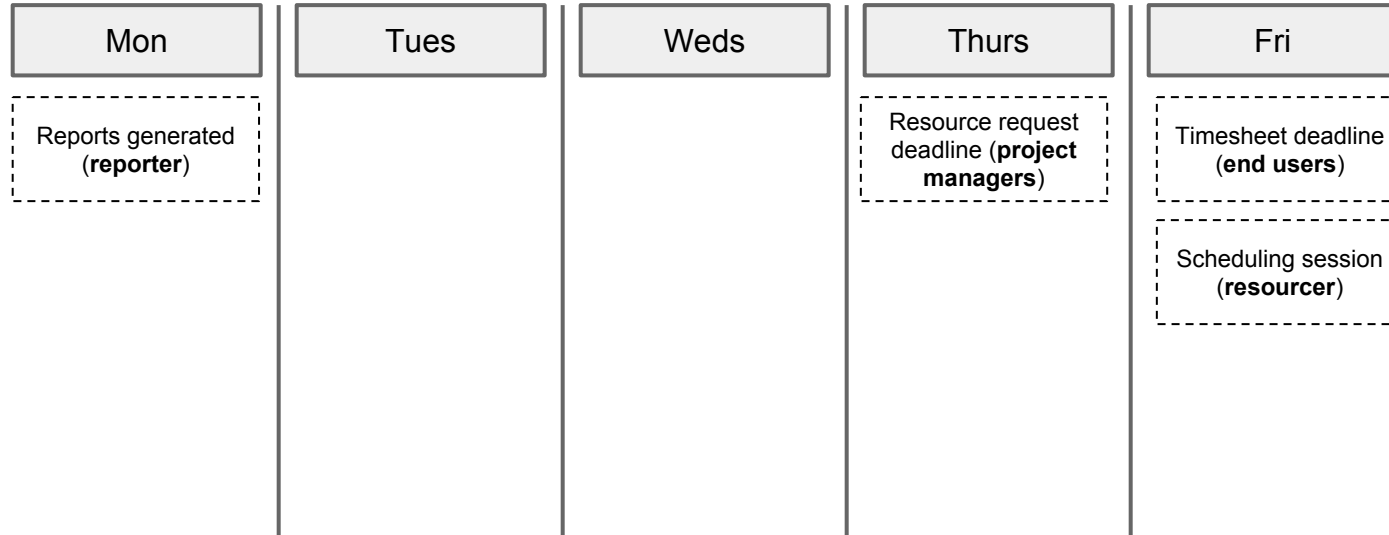
Time required:
1 hour
p/w

Project
Manager

End User

Develop Scheduling Process

How does resource management fit into the day-to-day operations of your business? This phase examines how resource management shapes processes and vice-versa. Many companies opt for a schedule similar to the following.



System Set Up

Setting up Precursive is an easy, painless process - our support teams are there to help and can provide templates that simply need to be prepopulated.

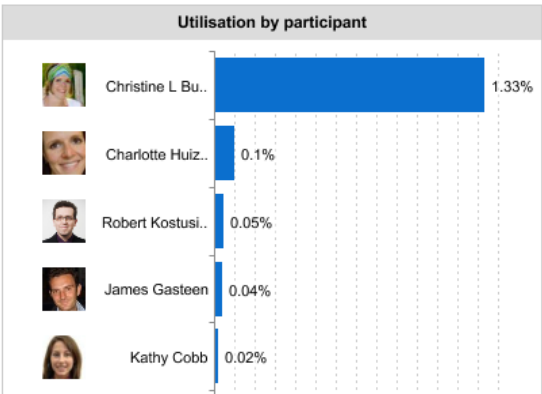
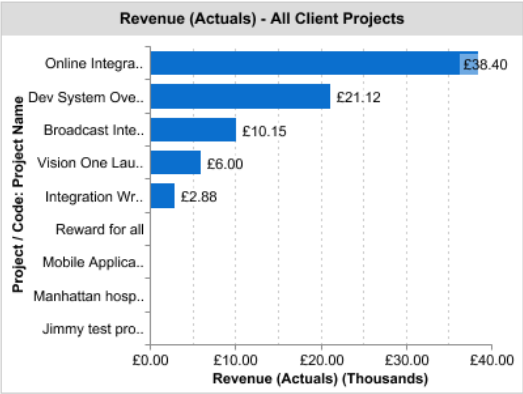
Organization	
Company Name	Precursive
Primary Contact	Nicholas Holmes
Address	Google Campus, 4-5 Bonhill St, London
Default Time Zone	UK
Default Language	English
Currency Locale	UK Sterling
Business Hours	40
Working Days of week	M/T/W/T/F/S/S

Client Accounts		
	Example	A
Client Account Owner	James Gasteen	P
Client Account Name	Subsidiary 1	S
Client Account Parent	MegaCorp	

Users	
	Example
First Name	Adrian
Last Name	Smalley
Email	adrian@precursive.co
Title	CTO
Company	Precursive
Department	Technology
Hours per day	8
Hours per week	40
Hourly rate	
Daily rate	
Manager	?
Skills tags	Project Management, Sales, Bid development

Select Reports/ Dashboards

We want Precursive to be useful from day one. To help achieve this, we may ask for some of your historical data, in a format we can import into Precursive. This gives us a strong Select Reports/ Dashboards with which to get started measuring your key metrics such as utilisation and enables you to make meaningful resourcing choices from the minute you start.



Training / User Adoption

Precursive provides plenty of training material to help get users going. As well as optional face-to-face training, there's a wealth of material online, including webinars and tutorial videos.

In Person

- Initial one-on-one training
- Classroom based training

Self-Guided

- Email
- Quick start guide
- Comprehensive support docs
- YouTube tutorials

Additional Support

- Zendesk community
- Email support