Encompass Service Foundation Implementation Milestones

WEEK 1	WEEK 2	WEEK 5	WEEK 11	WEEK 15	WEEK 16	WEEK 17	WEEK 18
Introduction	Discovery	Configuration	Testing	Training	Deployment	Post Deployment	On-going Support

Ellie Mae's methodology for best practice implementation is a series of steps that provide a framework to complete the project in a proposed timeline. Implementation timelines vary due to the client's resources, time invested in testing, and other client initiatives, which can impact their involvement in this implementation project. The timeline above shows the beginning week of each milestone and serves as a guideline to how our clients can achieve a 120-day deployment goal.

Implementation Methodology

The Ellie Mae® best practice implementation approach is designed to streamline implementation of the product suite to ensure that return on investment is achieved as quickly as possible. We offer a methodical approach to guide our clients through the steps needed to maximize the use of the products and fully integrate them into the business model of each mortgage lender. The milestones for Ellie Mae implementation process are as follows:

Introduction Phase

We conduct a series of webinars during the introduction phase to start the implementation process.

- Installation – Provision of software
- Kickoff Call
  - Define entire project team
  - Confirm that logins are working
  - Establish the communication channels
- Product Overview Training
- Define the project (product, services, timeline, players, project activities)

Discovery Phase

We conduct a series of webinars analyzing the client's workflow with the best use of the Ellie Mae product suite and the client's business model.

- The Implementation Project Manager performs a workflow review with the client.
- The Implementation Project manager will generate a client requirement document supporting the configuration requirements for the Ellie Mae product.
  - Setup requirements
  - Document requirements
  - Service requirements
- The client signs off on the workflow analysis and the requirements document before configuration of the product begins.

Configuration Phase

The implementation team and the client jointly complete the configuration of the Ellie Mae product suite to prepare the software for testing. The following setups are covered in the service foundation deliverable.

- Organization Hierarchy and User Setup
- Persona, Roles and Milestones
- Templates and Custom Alerts
- Product and Pricing Offerings
  - Loan Program and Investor Template
  - Fees and Impounds – GFE
  - Closing Cost Templates
- Compliance Service
- Credit Setup
- Documentation
  - Disclosures
  - Credit
  - Closing
  - Custom Documents
- eFolder Setup
- Business Rules

Testing Phase

In this most critical phase of the implementation process, the client must test the configuration of the product. The configuration team validates the configuration, trains the client on testing and completes a readiness review validating that the testing has been successfully completed by the client.

Training Phase

The training process differs based upon the client's needs and staffing. The statement of work provided with the purchase of the product defines the training provided by Ellie Mae's implementation team to support the client's deployment and maintenance of the Ellie Mae product suite.

- Train-the-Trainer session which provides clients a means to train the staff
- Train the System Admin to support the software
- Review of the training tools on the Resource Center

Note: Client requirements for training origination and operation users of the software varies greatly, so during the contract stage your sales representative will scope out the Statement of Work, which will outline the client's unique training requirements.

Deployment Phase

We recommend that the deployment be tailored to the client's business environment and staffing. Deployment should begin immediately after training.

- Review and adjust the deployment plan
- Execute the deployment as defined
- Leverage Implementation Project Manager through process

Note: Once the deployment begins, the implementation process deliverable is considered to be complete and the Implementation Project Manager will provide a deployment readiness review to the client for final acceptance of the project.

Post Deployment

The Implementation Project Manager continues to monitor the post deployment process and holds weekly meetings with the System Administrator and Trainers. Origination and operation users really don't know how to use the product well until the deployment starts, so these weekly reviews provide more continuity to support the deployment process.

On-going Support

The Implementation Project Manager will provide a proper hand off to the Account Manager who will manage the client's account going forward. The Ellie Mae Client Care team serves as a client's means to obtain on-going support of the software as defined by the maintenance agreement signed with Ellie Mae.

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