**FIRST WEEK PLAN**

|  |  |  |  |
| --- | --- | --- | --- |
| **Item** | **Description** | **Key stakeholders** | **Systems** |
| 1. | Platform/Product   1. Overview 2. Solutions/services 3. Types of implementation 4. Client/user experience. Guided walk-through 5. Documentation |  |  |
| 2. | Clients   1. Who are they? 2. Key accounts 3. Types/tiers 4. Current pipelines: implementations, sales 5. Client training/support 6. Client feedback 7. Meet the clients |  |  |
| 3. | Team   1. Roles and responsibilities 2. Team members/Org structure 3. Team Goals 4. Key metrics 5. Tools, systems, processes, methodologies 6. Team dynamics/strengths/areas of improvement 7. Ongoing education on platform |  |  |
| 4. | Project Implementation   1. Implementation lifecycle 2. Project governance 3. Technical implementation 4. Best practices/Recommendations 5. Project reporting 6. Project record keeping and checklists 7. Shadow team members in projects |  |  |
| 5. | Key stakeholders   1. Team interactions with internal stakeholders 2. Product 3. Success/Client team 4. Sales 5. Other departments/functional teams 6. Third party vendors/partners |  |  |
| 6. | Tools/Systems (description, purpose, how it works)   1. Administrative tools 2. Project tools 3. Implementation tools 4. QA/Testing tools 5. Logs/Troubleshooting tools |  |  |
| 7. | Weekly agenda   1. Team meetings 2. One on one meetings with team members 3. Client meetings 4. Internal status meetings 5. Other functional groups |  |  |
| 8. | Open issues  Top n issues that need to be resolved |  |  |