# SPOiRMM System Configuration Summary & Onboarding Checklist

## System-Level Configuration Items

| Configuration Item | Description |
|---|---|
| 1. Regulatory Categories | Defines categories of regulation influencing the org |
| 2. Jurisdiction Levels | Levels of governance (Local, State, Federal) |
| 3. Market Types | Industry groupings for segmentation and risk tracking |
| 4. Process Templates | Reusable process structures for workflows |
| 5. Agreement Types | Types of formal/informal agreements |
| 6. Risk Classification Codes | Tags to classify risks (operational, legal, etc.) |
| 7. Product/Service Definitions | What the organization exchanges or delivers |
| 8. Contract Types | Defines types of contracts used in Enterprise Tool |
| 9. Departmental Cost Centers | Financial tracking IDs tied to departments |
| 10. Needs Categories | Needs aligned with SPOiRMM levels |
| 11. Services Catalog | Services offered, linked to needs and providers |
| 12. Market Stability Status List | Growth or decline status of a market |
| 13. Market Influence Matrix Template | Optional model for player influence |
| 14. Market Tags | Tags to classify risks/issues by market theme |
| 15. Laws/Standards List | Registry of applicable legal or standards frameworks |
| 16. Market Segments / Submarkets | Granular layers within a market |
| 17. Player Influence Levels | Relative power of a player in a market |
| 18. Market KPIs | Performance indicators for market context |
| 19. Product ↔ Market Mapping | Links services/products to markets |
| 20. Exchange Flow Definitions | Maps who exchanges what with whom |
| 21. Market Relationship Dependencies | Critical cross-player dependencies |
| 22. Org ↔ Market Participation Map | Maps orgs to markets and roles |
| 23. Contract Status List | Lifecycle states of a contract |
| 24. Contract Ownership Assignment | Responsibility for contracts |
| 25. Contract Documents / Links | Upload or link to external contracts |
| 26. Contractual Obligations Table | Tracks terms and penalties |
| 27. Contract Risk Tier / Value Category | Risk or financial impact tier |
| 28. Departmental Objectives | Strategic department-level goals |
| 29. Department Classification Tags | Filters: Admin, Clinical, etc. |
| 30. Process Inventory Registry | Key internal processes per dept |
| 31. Agreement Validity Status List | Lifecycle stages for agreements |

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| 32. Agreement Performance Metrics | KPIs for agreement success |
| 33. Gap Trigger Rules | Flags for unmet needs or invalid agreements |
| 34. Workflow Templates | Reusable process blueprints |
| 35. Resource Types | Categories of resources (Human, Financial, etc.) |
| 36. Resource Assignment Matrix | Links resources to workflow steps |
| 37. Resource Availability Calendar | Tracks availability and conflicts |
| 38. Utilization Thresholds | Min/Max bounds for alerting |

## Onboarding Checklist for New Organizations

| Checklist Step |
|---|
| Register organization and create root account/admin user |
| Create user roles and invite key team members |
| Set up Players Chart: define internal and external stakeholders |
| Configure Jurisdiction Levels and Regulatory Bodies |
| Set up Laws/Standards and link to jurisdictions and categories |
| Define Market Types and Segments; assign players |
| Add Products/Services and link them to markets |
| Define Resource Types and Time-Based SLAs |
| Build out Agreement Types, Needs Categories, and Service Catalog |
| Create Department structure and assign internal responsibilities |
| Input initial Workflow Templates and Process Inventory |
| Configure KPIs for Departments, Agreements, and Markets |
| Review and activate all system-level configuration lists |
| Begin capturing issues and linking to tool contexts |
| Use tools to analyze, group, and escalate issues into risks |