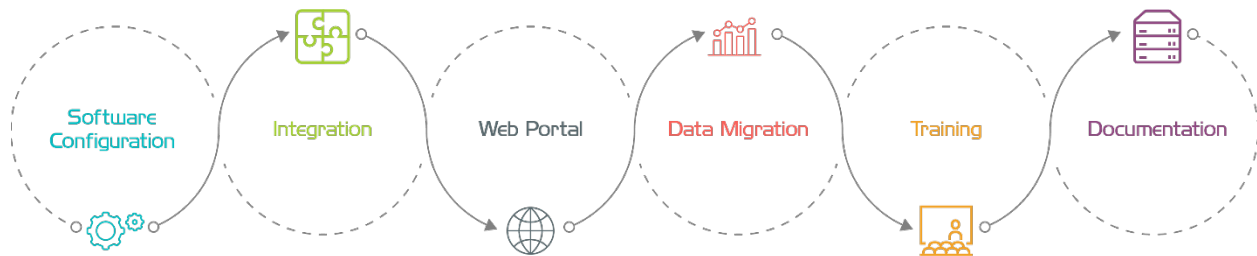




Implementation Methodology



Implementations contain 3 key areas: technology, people, and process. Each one is equally important and will be discussed in detail below.

Approach to Technology

Our approach to technology is a bit different as we've automated the areas of implementation that are replicable and turned the implementation into a product. This includes the following areas:

1. We start with an "Automated Installation" that loads our solutions. This also performs the data initialization of the system, populating the standard data required. The same tool used to perform the installation remains enabled to perform upgrades as they become available. The benefit is that all installations and upgrades are performed in the same manner ensuring consistency as well as reducing the amount of time the install requires.
2. We've developed a set of standard forms that are used to populate the referential data (i.e., accounting companies, products, memberships, committees and events.). We work with our clients to complete these forms before the system processes and populates the data. Using a defined, standard approach ensure a consistent method of collecting the data and getting it setup. This also reduces the amount of time required during the assessment phase as we will already have the data.
3. Data migration is the most critical step in the process. A particular area of risk is ensuring that the accounting data is 100% accurate. Towards that end, we've developed a data migration toolkit that includes data templates for accounts, contacts, memberships, invoices and payment



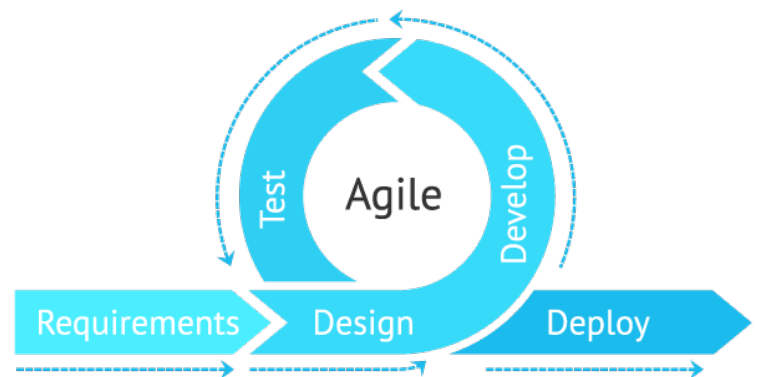
and includes logic built maintain enforce data integrity. For example, imported invoices and related revenue are automatically reconciled back against the import file. This is beneficial as we are able to reduce the amount of time associated with importing data and ensure the accuracy of the data imported.

4. "People and Process" are equally important to a successful implementation. You can have great technology but you also need a great partner that will work with you to ensure that the best possible solution is provided to your organization. Our approach to addressing these areas starts with an upfront "Business Assessment." The project team (which includes members from your organization and ours) performs the following:
 - a. Reviews the requirements for each area/department.
 - b. Defines the requirements and makes recommendations on how they will be met.
 - c. Determines any gaps that exist and address them.
 - d. Look to ensure that best practices are followed. (Just because something has been done a certain way doesn't mean it's the best way. We don't want to recreate the old system.)

The deliverables include:

- a. A defined project / core team. i.e., PM's, SME's, Senior Consultants
- b. A defined project plan and timeline (including blackout dates)
- c. Defined requirements
- d. GAPS and addressing approach for closing our Gaps.
- e. Refined pricing

5. System Implementation – "Full system replacement and go live" vs. "Component Replacement w/ phased go lives". Both of these implementations are done in an Agile fashion where the work is performed in "Sprints" (which are typically two-weeks) and build on the work completed in the prior sprint. For example, after the system has been installed and initialized, there would be an "Accounts and Contacts" sprint followed by a "Membership" sprint followed by an "Events" sprint followed by the "Accounting" sprint, etc. Training, testing and data migration are included in each of the sprints. NOTE: this is an example and the project plan will define the sprints and the order of the implementation. Depending on the needs of each organization, the actual implementation of the system can be done in either these ways and will be decided as part of the assessment or potentially beforehand if there is enough information available to decide.





Both the Full System Replacement and the Component Replacement approaches are successful and the appropriate one for your association will be determined based on the needs and requirements outlined by the project team. Below is a high-level overview of each approach.

Full System Replacement: this is the traditional approach to implementing a system and focuses on implementing all aspects required to “replace” the existing system and then go live. This approach can also include the implementation of new functionality as well. It follows the Agile methodology discussed above. At the end of the configuration of the system (all modules have been configured and implemented); Staff training is completed, “End to End testing” and “User Acceptance Testing” (UAT) are performed and once there is approval to move forward, the “Go-Live” process begins. This includes the final data-migration, any pushes of configuration or updates to website are done and once complete, the system is live. As part of go-live, Altai provides support as users become more acclimated to the system and begin performing their “day to day” work. The project is typically closed out two to four weeks after go-live and the client moves into support mode which includes setting them up with our self-service web portal and introducing them to the support team. The project team continues to “check-in” and ensure the system is performing up to expectations. At an appropriate time after go-live (six to nine months), we will schedule a review to discuss how the system is working and how it could be improved based on user feedback. At the one-year mark, the account manager will schedule a “check-in” call to follow up and get any additional feedback.



Component Replacement: the component replacement approach is geared towards organizations that have a need to get “certain aspects of the solution” up and running in a quick time-frame. In this approach, the system is deployed in phases and each phase would have sprints (as defined above). Examples of where this approach is used include:

- a. The organization would like to start using the marketing module prior to the final go-live. This may require that they have access to accounts and contacts in the system and some related data but not all data. We can deploy these modules and implement a data-sync with your existing system to ensure current and accurate data. Once this is complete, the client can begin using marketing functionality while other areas of the system are implemented. We have successfully done this for a number of clients. The steps outlined in the “Full System Replacement” are included as part of this approach but the order will vary based on the scheduling and release of the different areas of the system.
- b. The organization has multiple systems that include customer data and they want to migrate each of the existing systems over to Dynamics 365 “one by one”. We have successfully done this for an organization that have five different systems. The steps outlined in the “Full System Replacement” are typically followed for each of the existing systems that are migrated over “one by one”.

The end result of a “Component Replacement” implementation is the same as the “Full System Replacement” in that the legacy system will have been replaced. Some benefits of this approach include:

- c. Users are able to start using the system sooner and become familiar with it. The successful implementation of a “Quick Win” (i.e., the marketing example above) builds confidence and trust in the new system as users are getting value early on in the project.
- a. As the system is going live in phases each phase builds on the prior one. This typically leads to a less stressful “go-live” as there is a lot more familiarity with the system and there isn’t really a “big-bang” go-live as they have been several “smaller” go-lives.

NOTE: The “Component Replacement” implementation will include all aspects outlined in the “Full System Replace”. The difference will be in the scheduling and when the users start using the system.