

**FINTECH ACTION AND ROLLOUT**

**Investigate and Plan**

**Set Up**

**Pilot**

**Go Live**

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| **1. Investigation and Planning** |
| Software | <Name> |
| Project commencement date | <Date> |
| What will the software do or achieve for the business? What are the pain points you are hoping to solve? | e.g. reduce time to perform a task, make it easier for clients to interact with the practice, reduce the cost to serve, increase efficiency, grow your client base |
| Software functionality – what does the software do? | <Key functions> |
| Does the functionality resolve the problem the practice is trying to solve? | <Yes/ No/ Partially> |
| Who is in charge of the project and rollout? | <Name of Person> |
| Is the software to benefit the business or clients or both? | <Business/ clients/ both> |
| Have you looked at multiple providers? | Yes/ No/ Why was Software chosen over the others |
| Does it integrate with XPLAN? Is the integration a push and a pull of data (Two way) or just a pull or push (One way)?If it does not integrate into XPLAN how will you get the data into XPLAN. | Yes/ No Additional information |
| Is this a Centrepoint Alliance Security approved software? [**Please click here**](https://techsolutions.cpal.com.au/integrations/)  | Yes/ No |
| If No, please ask the software company to complete the following form:  | [**Centrepoint Alliance Cyber Security Form**](https://centrepointalliance.snapforms.com.au/form/third-party-it-and-cyber-questionnaire) |
| Contract terms e.g. month by month or minimum of 12 months | <Contract information> |
| Cost set up cost and ongoing | <Cost Information> |
| Estimated amount of time or money the system will save | <Information e.g. 10 mins per client 10 mins per review etc> |
| Estimated effort/time to set up at the outset | <Estimated effort to set up> |

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| **2. Set Up** |
| Sign contract or commence trial period | <Date signed> |
| Project commencement date | <List tasks needed to set up> |
| Set up tasks – API linking, loading of client data, issuing of log ons for staff, template set up, instructions for clients on how to use | <How training will be provided – by provider, online, project owner> |
| Any specific configuration e.g. Risk profiles, assumption rates, logos | <Specific set up details> |
| Communication and Training of staff on new software the reason why it is being implemented and how to use it | <Key functions> |

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| **3. Pilot** |
| Testing – Internal by the practice | <What testing will be conducted and by who> |
| Testing – External (if client facing) with a small number of clients | <What testing will be conducted and by who> |
| Update of any processes or policies that are affected by the new software | <Identify what needs updating> |
| Make adjustments based on feedback from users | <Complete changes> |
| Make adjustments on feedback from clients | <Complete changes> |
| Fix any identified bugs/issues | <Fix Bugs> |
| Identify any functionality deficiencies – are these sufficient to stop the project from moving forwards. | <Confirm if project should proceed after pilot> |

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| **4. Go Live** |
| Communication to clients (if client facing) | <Email/Video etc> |
| Ongoing maintenance plan – upgrades/ changes | <Who is responsible, how often will it be reviewed> |
| Post go Live meeting 6-8 weeks after rollout to check for issues, ensure being used in the business as intended | <Program owner> |
| Project completion date (when software is embedded into the business as usual) | <Date> |