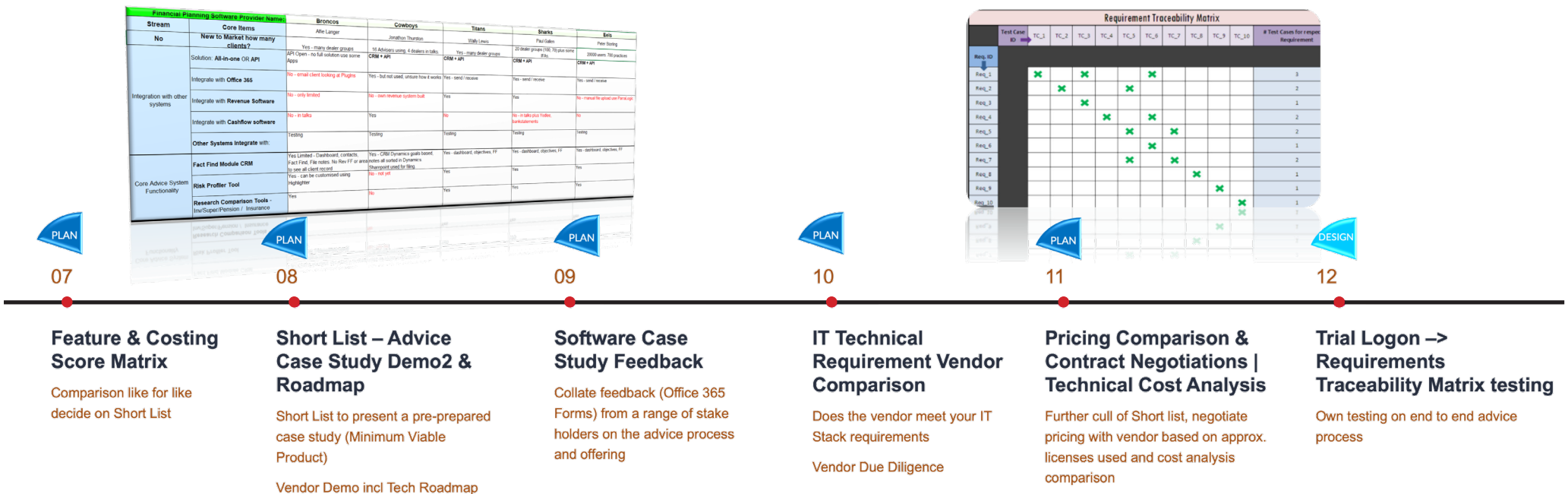
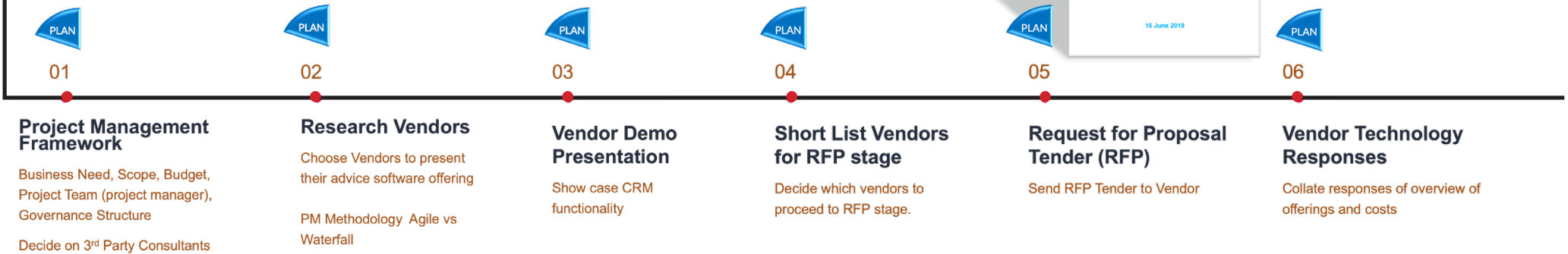


Advice Software Project Plan – Case Study





CUSTOM MAPPING				Origin Financial Planning			
Ref	Description	Source Section	Source Field	Source Choice options	Destination Section (name)	Destination Field (name)	Destination Choice options
1	Site Version	Site Version					
2	User List	Users					
2.01	Pre-existing users	Pre-existing users					
2.02	Adrian Buckley	Adrian Buckley					
2.03	Cameron Smith	Cameron Smith					
2.04	John Schmitt	John Schmitt					
2.05	Debbie Palmer	Debbie Palmer					
3	Groups						
3.01	Membership	Membership					
3.02	Alternative	Alternative					
4	Insurance	Insurance					
4.01	Convert All	Convert All					
5	Underwriter	Underwriter					
5.01	Policy Purpose	Policy Purpose					



13

Recommendation to Committee/Board

Final Recommendation for approval & select vendor

Project Governance

Decide on 3rd Party Consultants for Implementation



14

Select Vendor & Sign Contracts

Legal Sign Contract - SOW

Budgets / Order Schedule Licenses

Admin / Hierarchy Setup

Adviser Cost Personas



15

Implementation Phase

Project Status Report

Project Stream Terms of Reference

Implementation Plan incl timeframes for rollout



16

Product Implementation Site Config & Coding

AdminSite / Workflows / FF / Advice Documents / Client Portal / Templates / Research / APL / Compliance Checklists / Revenue / Reporting



17

Data Migration Testing

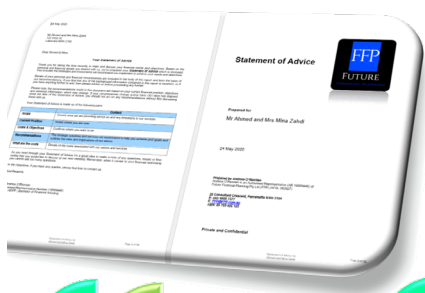
Data Subset Testing into UAT site
Data Mapping Guide / Conversion Schedule
Data Mapping CUSTOM FIELDS



18

Integration / UAT Testing

Integration other systems
User Acceptance Testing
Business Acceptance Testing
Access Levels - Logons



19

Pilot | Final Data Migration | Training

Pilot Program

Final Data Migration

Training



20

Go Live

Cross Over old system vs new (1-3 months)

Training, Training, Training

Post cut over Testing

Ongoing Support

Project Implemented

www.aoras.com.au

