Get ready for your Implementation

We want your implementation to be successful. After hundreds of implementations for clients with a wide range of asks, we've seen success with clients that prepare themselves for their implementation.

Implementation Prep Checklist:

1. Project Manager

While our OrgChart Experts advise you on best practice and industry standards, we need to know what your organization needs out of OrgChart Now to make it as successful as possible. A dedicated project manager speeds up implementation and requires less iteration.

2. Examples of current charts

You've probably got a baseline of how your charts look that you're used to- that's perfect! While we may not be able to replicate everything in your current charts exactly, this helps us understand what you want to communicate visually and how things are laid out.

3. IT resource

If you're connecting with your SSO solution, sending us your data via SFTP, or have special needs for IP whitelisting or other restrictions, make sure your IT staff is available to assist. It won't take much time at all, but we'll need them there for certain stages.

4. HRIS system administrator

If you haven't already finalized your setup to your data source, we'll need a system administrator to help us build out connection details and advise on the location of certain pieces of data. We strongly recommend that this person reviews our <u>connector documentation</u>

5. Time on your calendar

We're happy to email you- but some things are best done face to face (virtually, of course.) Our job is to get you set up and ready to go, but you'll need at about an hour or so each week for a regular check in.