

**Investigate and Plan**

**Pilot**

**Go Live**

**Set Up**

Fintech Action Plan and Rollout

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| **1. Investigate and Plan** | |
| 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>* |
| **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>* |

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