

Implementation Governance

Creating wildly successful customers with implementation

STAFFING FOR SUCCESS

Sales & Operations
Integration

Aligned Team

SMEs Involved:

- EDI
- API/SSO Integrations
- Contact Center
- COBRA
- Billing
- ACA
- Dependent Verification
- Practice Leadership
- Compliance

PLANNING AND EXECUTION

**Weekly Sales & Operations
Integration** review meetings

Clear customer expectations /
level of effort

Project plan with Milestones &
Task Assignments

Weekly Status Meetings with
Customer Health Sentiment

Utilization of **Status Log, Risk
Tracker, Open Items**

BEST-IN-CLASS MILESTONE TRACKING

Scope of Services

Requirements Wizard

User Acceptance Test Plans
(access to masked production
data)

Training Platform

Transition Timeline and
Checklist

Administration Guide with
SOPs

Processing Calendar

**Open Enrollment Guided
Renewal Tool** Wizard

ONGOING MANAGEMENT

Executive sponsorship

Governance oversight:

- Weekly Health Reviews
- Quarterly Business Reviews
- Annual Stewardship

**Release Education &
Technology Roadmap**