



Planning for Accruent Project Management

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» Agenda

- Accruent PM overview
 - Current state
 - Upcoming functionality
- Planning The Move
- Executing The Move
- Ensuring Ongoing Success



ACCRUENT PM OVERVIEW



» Accruent Project Management

Functionality available now:

Location and Project Info	Access a single source of truth for all of your project information
Document Management	Ensure data integrity and improve efficiency and collaboration
Milestone Management	Complete projects on time
Task Management	Keep your project teams aligned



» Location & Project Info

- Store a wide variety of client- defined attributes by location including competitor info, trade area, brand, and phone numbers
- Link one or more projects to a location
- Create custom templates and client-defined attributes
- Leverage a location landing page to view all relevant information for a given location
- View a personalized dashboard displaying real-time project information



» Document Management

- Share and manage company and project documents in a standardized, collaborative online environment
- View and mark up dozens of file types within the web browser
- Commenting, versioning, audit history
- Check-in and check-out functionality
- Configurable Doc Folder Templates





» Milestone Management

- Manage planned, projected and actual dates (both start and end)
- Create, administer and enforce templates based on your project types and processes
- Adjust schedules dynamically based on actual progress
- Assign milestones, add comments and view history





» Task Management

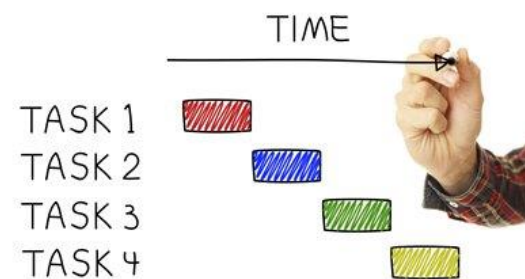
- Manage and track ad-hoc tasks
- Select the right type of task – including Action, Approval, RFI, RFP and Submittal
- Ensure all project task details are captured and are easy for every team member to access
- Generate email notifications on task assignment





» Planned Functionality

- Project Financials
 - Budgets
 - Bid Mgmt
 - Purchase & Change Order Mgmt
 - Invoicing
- Advanced Schedule Mgmt
- Multi-Currency
- Dashboards and Reporting





» Timeline for moving

- We want to keep customers informed of our progress through regular webinars and user group engagement
- Account managers can also help with questions
- Some customers can migrate now
 - Those using more basic VisionPM modules
- Other customers can migrate beginning in Q4
 - We are building out cost tracking, advanced scheduling and forms/workflow throughout 2014



» Key Advantages

- Browser support and mobile
- Configuration by the client
 - Custom Attributes (UDFs), Document Templates, Schedule Templates, Custom Tasks, (and more to come)
- Enhanced security model
- SaaS delivery with dedicated databases per client
- Feature/function
 - Check-in/check-out
 - Drag-and-drop upload
 - Mobile document viewing through Brava HTML5
 - Milestone predecessors/successors
 - Lag/slack days, Gantt view (planned)
 - Auditing of all activities in the application



PLANNING THE MOVE



» Readiness Checklist – Functional

- Stakeholder engagement and feedback gathering
 - Business process reviews
 - Understanding data tracked and reported on
 - Updated reporting
- Improving templates
 - Project, schedule, documents, task, budget, etc.





» Readiness Checklist - Technical

- Gathering questions around our data center, security requirements, SLAs, etc.
- Decisions around data storage/retention
 - Attributes and data mapping
 - Bringing over old documents and schedules
- User security mapping
- Integrations
 - Which integrations need to exist in the new system





EXECUTING THE MOVE



» Budgeting

- Costs will vary based on your implementation requirements
- Included in cost
 - Set Up, Design, Configuration, Testing
 - Training, Go Live
- Variable costs
 - Data Migration, Custom MSTR reports, and integrations

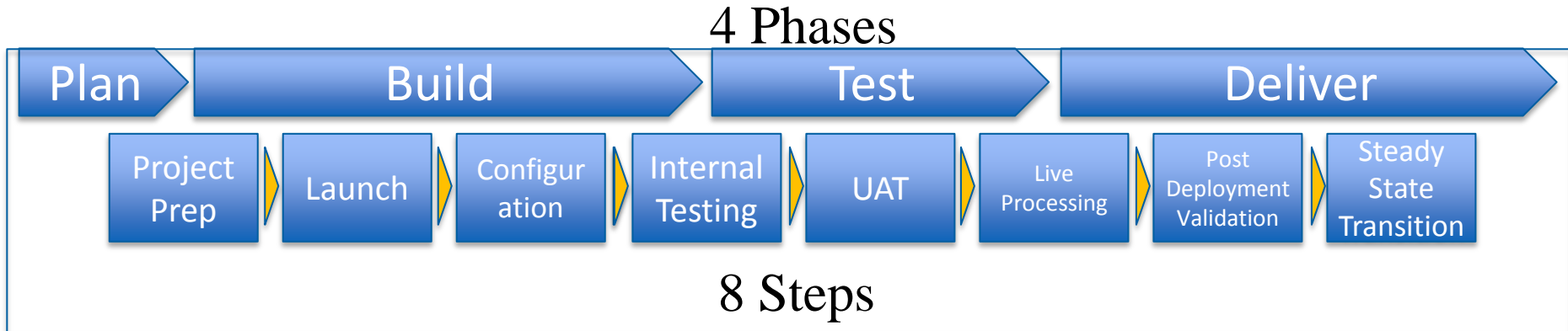


» Migration Sequence

1. Readiness checklist completed
2. Accruent-guided migration plan
 - a) Identifying requirements, timing, resources
3. Regular checkpoints
4. Data transfer (test environment → production)
5. Training
6. Go-live



» Implementation Process





ENSURING ONGOING SUCCESS



» Account Management and Support

Account Management

- Has knowledge of client's use of product and business
- Shares best practices, industry experience, and product updates
- Acts as a client advocate and helps to manage issues



Support

- Receives and manages client requests
- Escalates product defects and enhancement requests to engineering and product management



» Change Management and Adoption

- Training options
 - In-person training available
 - Computer-based Training
 - Hands-On Lab
 - ProTips and context-sensitive help
- Governance and accountability; usage reporting





» Summary

- We are confident that Accruent PM will deliver immediate and long-term value to your organization
- We are working to make migrations as smooth as possible
- Our PS team has proven processes to help customers migrate and go-live
- Internal prep-work will be required on your end and we're here to help



» Reminders

- Fill out the Survey to enter to win \$500 gift card
- Visit the Product Lab
- Cocktail party tonight 5:30-7:30 in the foyer
- Accruent executive Q&A session Wednesday 10am-11am
- Submit Questions in Advance at the “Make It Easy” Station where you registered

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