

# Onboarding Process in a Nutshell

The project implementation is expected to take up to 3 months

Yieldigo



## Discovery

(3 weeks)

**GOAL:** Initial data samples cleaning and mapping, business setup discovery

**OUTCOME:** Cleaned data from the inconsistency and gaps; automated data flow in the set format and structure

The implementation of the Yieldigo price management solution starts with the data onboarding and business discovery sessions, followed right after the project Kick-off.

Firstly, the data format and structure are clarified to initiate the delivery of data samples and cleaning iterations. After thorough/ precise data cleaning iterations, all mandatory data is prepared for the environment formation.

The business discovery sessions are ongoing as this process goes hand-in-hand with data cleaning and clarification.

The Yieldigo Client Onboarding team guides the client through the whole process by conducting regular status update meetings, emphasizing the upcoming activities and milestone deadlines, and possible risks to meet the project schedule. Also providing pricing strategy setup and key user workshops supporting those with the training materials.

## Implementation

(5 weeks)

**GOAL:** Integration, data validation, pricing strategy setup, users training

**OUTCOME:** Integrated and cleaned data in the platform, set pricing strategy and goals according to the business needs, key users' confident usage of the solution after the detailed workshops, provided training materials

Data integration starts with the environment creation based on the set data structure, followed by the data validation process and pricing strategy setup.

The pricing strategy setup workshops are held during this phase according to the agreed schedule. The workshops and the supporting training materials help the client team set up the pricing environment according to their business goals and needs.

## Handover

(2 weeks)

**GOAL:** Integration tests, final touch-ups on the solution setup

**OUTCOME:** Conducted implementation test (suggested prices check) and dry tests (E2E automatic data flow), key users' readiness to use the platform in production

The Handover phase consists of the repricing end-to-end process and data flow integration test, final touch-ups on the solution setup, and usage Q&A sessions with the key users. The main goal is to run an automatic full data flow dry test and the regular usage of the pricing environment in the testing mode by the key users to guarantee smooth functioning for the Go-Live.

## Go-Live

Launch of Your New Yieldigo Software, Regular Usage, and Hypercare Phase

**GOAL:** Initiate regular repricing in the client's production environment

**OUTCOME:** Key users are confident in their understanding and use of the pricing management tool. The regular repricing process is successfully scheduled and configured

The **Hypercare** period (4 weeks) starts with the Go-live on production, providing the extra support to guarantee smooth functioning after the implementation project closure.

Subsequently, we offer regular support to ensure continued success after the Hypercare period.

## Data

The detailed dataset structure requirements are precisely described in the Integration Manual document, which is shared with the client before the project starts for data preparation and feasibility. During the data onboarding session, the data requirements are mapped with the client data structure, the possible data gaps and risks are identified and mitigation is clarified.

The data cleaning process is fully supported by the Yieldigo onboarding team. The regular data feedback is provided until the final structure is clarified for the instance formation during the Discovery phase.

## Onboarding of People

(Client's side)

Successful project implementation requires active client team engagement in providing clean data to set up the regular data feed and the pricing team participation for the tool and pricing strategy setup. The required project team roles and the expected resource allocation are identified before the project starts.

### Required client project team:

- 👤 Sponsor
- 👤 Pricing strategy manager
- 👤 Category manager (key user)
- 👤 Data Specialist
- 👤 Project manager (optional)

## Change Management

The project scope is identified during the business study before the project starts.

In case of a scope change, the re-evaluation is initiated and the additional time/costs are communicated at a weekly status meeting for approval.