

ACT training/implementation/migration

Revised 1/16/03

Phase 1

Objectives

1. Implement electronic referral process using ACT!
2. Track all sales prospects through entire sales process
3. Track all client communications via notes
4. Migrate database to new model by start of staff training
5. Train all staff on contact management functionality of ACT! 2000

Tasks

Done	Complete by	Task	Responsible party
✓	8/29/02	Document phased implementation and distribute to planning team	Aaron
✓	8/30/02	Verify lab functionality; troubleshoot email profile problem	Aaron
✓	9/3/02	Create/document electronic referral procedure	Aaron
✓	9/13/02	Provide ACT! Intro training to staff	Jeff
✓	9/4/02	Create groups to fit workflow and prospect model (prototype)	Aaron/Kevin
✓	9/4/02	Inventory/map existing user-defined fields and new user-defined fields	Aaron/Kevin
✓	1/17/03	Verify values, required status, and security for all fields	Aaron/Kevin
✓	1/17/03	Complete screen layout	Aaron/Kevin
☒		Create "lookup by rep" queries and menu	Kevin
✓	2/6/03	Implement new screen layout on all desktops	Aaron/Kevin

Phase 2

Objectives

1. Integrate Palm devices with ACT! 6.0 using ACT! for Palm
2. Deliver remainder of training to staff
3. Fully implement ACT!

✓	2/20/03	Revise flowchart	Aaron
✓	3/14/03	Customize training for ACT! 6.0 and B&I processes	Kevin
✓	3/14/03	Review ACT! training	Jeff/Aaron
✓	2/20/03	Order Intellisync	Aaron
✓	3/21/03	Install Intellisync on 2 stations	Aaron
✓	2/10/03	Test ACT for Palm	Aaron
✓	2/20/03	Order ACT for Palm	Aaron
✓	3/29/03	Upgrade ACT to v. 6.0	Aaron
✓	3/29/03	Install ACT for Palm on Palm devices	Aaron
✓	4/3/03	Provide basic ACT! training to staff	Kevin
✓	4/4/03	Assign all companies to team east/team west Note: government and split zip codes will not be assigned at this time pending decisions on how to handle them	Aaron
✓	4/17/03	Provide training on ACT! for Palm	Kevin

Phase 3 objectives

- Implement reporting