ProEst®

IMPLEMENTATION PLAN


ProEst

WELCOME

This is where ProEst gets real.

The implementation of ProEst represents an important beginning for both our clients and the ProEst team—a starting point for a relationship that we hope will be long-lasting and mutually rewarding. During the implementation phase, it is up to us to deliver on the trust that our clients have placed in our product and our company. We will use our combined knowledge and expertise to create a trusted partnership that drives their success.

To that end, we have established a formalized implementation process that is vital for every stakeholder to know and understand. By following these six sequential steps—and clarifying processes as we go—we can help ensure a reliable workflow, accelerated user adoption, and ultimately, the business results that our clients expect.

> **" The key to our success as a company is how well ProEst is introduced to, understood and adopted by our clients. "**
>
> **— Jeff Gerardi, President & CEO**

6 STEPS TO SUCCESS

A SYSTEMATIC IMPLEMENTATION PROCESS IS THE SINGLE MOST IMPORTANT ASPECT OF CLIENT SUCCESS

OVERVIEW

As part of our commitment to delivering the fastest return on our clients' ProEst investment, we have established six sequential steps in the implementation process, helping to ensure the rapid adoption and successful use of ProEst in the client environment.

1. KICKOFF MEETING
2. MIGRATE DATA
3. CONFIGURE SYSTEM
4. TRAIN USERS
5. DECISION TIME
6. GO LIVE

6 STEPS TO SUCCESS

1 KICKOFF MEETING

SETTING THE STAGE FOR A SUCCESSFUL PROEST IMPLEMENTATION

This step is the official start of the implementation process. In this step, ProEst team members will set expectations for timing and determining roles and responsibilities. The ProEst team will answer questions, address concerns and leave with a mutually agreeable “go forward” plan.

With over thirty years of implementation experience, we understand that there will always be a variety of client needs and expectations, “go live” deadlines, barriers to adoption and other company-specific issues. No two organizations are the same, which means that although these guidelines help to standardize our approach to ProEst implementation, we acknowledge the need to remain flexible and responsive as each situation dictates.

By providing a formalized, end-to-end framework for implementation, the ProEst team will be fully equipped to recommend best practices for roll-out and streamline the adoption of our platform. Just as important, client-side stakeholders at every level will be informed and engaged early in the process, contributing to their understanding of the value of our platform and accelerating user acceptance.

WHAT WE'LL ACCOMPLISH IN STEP 1:

- ☐ Introduce key stakeholders and identify roles
- ☐ Confirm the current technology in use for customer management, estimating accounting and project management
- ☐ Start database discussion, versions and source of data to be migrated into platform
- ☐ Set project reporting timelines to keep project schedule on track
- ☐ Set key milestones with target dates

KEY IMPLEMENTATION ROLES

PROEST SIDE	CLIENT SIDE
Executive Sponsor The ProEst Executive Sponsor serves as a senior-level partner to his or her client-side counterpart, taking on similar executive responsibilities within the ProEst team and being available to address and resolve escalated issues if necessary.	**Executive Sponsor** This role requires an executive-level team member with a vested interest in seeing ProEst rolled out across the client organization. The executive sponsor will receive regular updates on project status and may become involved in escalated issues as needed.
Implementation Manager The Implementation Manager serves as the main point of contact throughout the implementation period. With a thorough knowledge of the ProEst platform, he or she will be involved in every aspect of the rollout process—from initial discovery meetings until the "go live" date. This role is instrumental in helping to migrate data, configure the system, and conduct training to meet agreed-upon timeline dates.	**Implementation Lead** The Implementation Lead is the key point of contact for the rollout of ProEst. They should expect to commit a significant amount of time to implementation early in the adoption lifecycle. They will also be the main point of contact for training questions and support issues from internal employees, escalating issues to ProEst as needed.
Account Manager The Account Manager will be the primary contact after implementation is complete and the client is live. This role is responsible for responding to client requests and actively contributing to a successful long-term relationship.	

IMPLEMENTATION TIMELINE

MILESTONE	DATE(S)	DAYS
1 Kickoff Meeting		
2 Migrate Data		
• Deliver Data Files to ProEst		
• Meet to Review Data with Client		
• Import Data set and QA		
• Review Migrated data with Client		
3 Configure System		
• System Setup and Configuration		
• Workflow Design		
• Integration Setup		
• Reporting		
• Validate Configuration		
• Validate Workflow Process		
4 Train Users		
• Self-Training		
• Group Training		
5 Decision Time		
6 Go Live		

The chart above should display the agreed-upon dates and durations so that implementation expectations are clear on both sides.

2 MIGRATE DATA

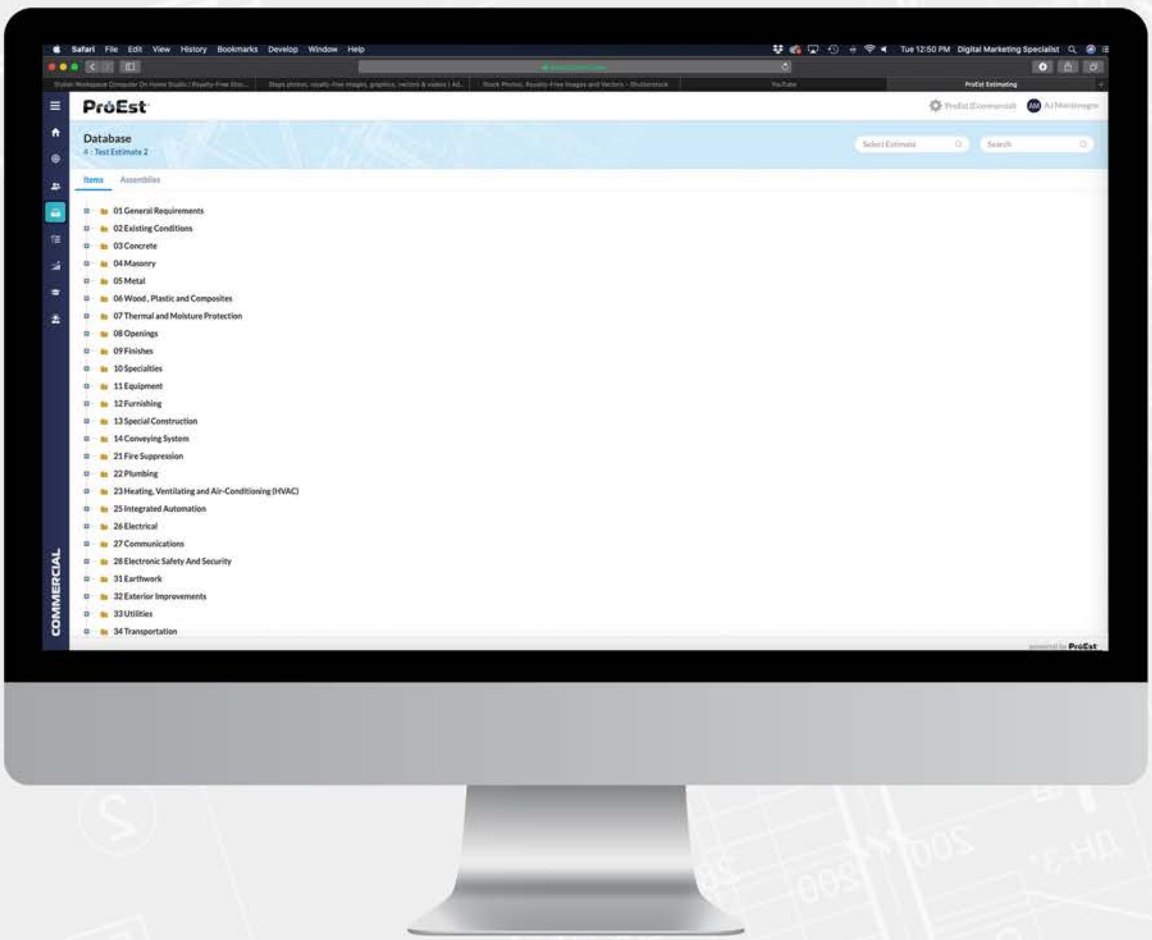
CREATING A SINGLE, ROBUST DATA BASE FOR EVERY ESTIMATING ACTIVITY

While volume will vary, the overwhelming majority of new ProEst clients will require some form of data migration, and will need active support from the ProEst implementation team to address issues related to system architecture and integration requirements. The goal of this phase is to import and consolidate all relevant client data to create a single, robust data base that can be leveraged for future estimating activities.

In order to be migrated and integrated into the ProEst platform, all existing client data must be in Microsoft Excel format, and can include materials items, client lists, vendor lists and other information essential to the estimating process. Also, by obtaining and reviewing client-provided reporting samples, the ProEst implementation team will gain important insight into the estimating process clients use now, which will inform best practices for the adoption of the ProEst platform.

WHAT WE'LL ACCOMPLISH IN STEP 2:

- ☐ Determine what existing client data needs to be migrated
- ☐ Collect and review necessary data and current reporting samples
- ☐ Establish a workable schedule for material deliverables
- ☐ Evaluate scope and quality of data once received
- ☐ Assess system integration requirements
- ☐ Assess and test migrated client database
- ☐ Obtain client sign-off on migrated data



3 CONFIGURE SYSTEM

TAILORING PROEST TO MEET CLIENT NEEDS AND PREFERENCES

The goal of this third step in the implementation process is to tailor our platform to align with our new client's specific business needs, user preferences and work processes—resulting in a system that accelerates adoption, maximizes their productivity and is uniquely their own. In order to ensure the right "fit," the ProEst implementation team must understand our client's business requirements, and make sure that the ProEst Administrator has a working knowledge of our system configuration, enabling any future additions or adjustments to the platform as needed.

WHAT WE'LL ACCOMPLISH IN STEP 3:

- ☐ Company Setup (Logos, Time Zone)
- ☐ User Roles Setup
- ☐ Department Setup
- ☐ Password Configuration
- ☐ Estimate Types
- ☐ Estimate Status
- ☐ Labor Setup
- ☐ Equipment Setup
- ☐ Crew Design
- ☐ Sort Types
- ☐ Markup Setup
- ☐ Relationships
- ☐ Workflow Design (Roles, Templates, Process)
- ☐ Integrations (Project Management, ERP, etc.)
- ☐ Reporting
- ☐ Validate data set
- ☐ Validate workflow process
- ☐ Validate integrations

4 TRAIN USERS

ACCELERATING THE LEARNING PROCESS WITH FLEXIBLE OPTIONS

Training new users is a crucial part of successful client onboarding. ProEst offers a variety of training options, all conducted by our experienced ProEst Implementation Managers. New users will participate in classes which include a Q&A and recap of the previous session. They are encouraged to practice independently, ask questions and request additional training support as needed, using the newly completed system configuration. ProEst training options include:

Self-Training

Our built-in learning management system offers quick self-run training sessions that will deliver basic user information through online videos.

Group Training

These sessions can be completed either online or in person depending on your preferred method. Using the completed system configuration, this training includes the workflows and companywide processes that have been defined in Steps 1, 2 and 3.

WHAT WE'LL ACCOMPLISH IN STEP 4:

- ☐ Determine if training sessions will be conducted in person or online
- ☐ Determine location of training if live instruction is preferred
- ☐ Schedule dates and times for ProEst training sessions
- ☐ Evaluate new user readiness to productively estimate projects with ProEst
- ☐ Identify any aspects of ProEst that appear especially challenging or problematical
- ☐ Recommend, schedule and conduct additional training as needed

5 DECISION TIME

ACTUALIZING THE POWER OF PROEST IN THE CLIENT ENVIRONMENT

The end point of implementation is the go live decision, typically based on a meeting in which all stakeholders can share their thoughts, experiences, questions and concerns about the implementation process in an open, interactive, problem-solving forum. Feedback obtained will inform next steps: determining if the client is ready to "go live," or if there are any outstanding issues that need to be remediated with further training, system re-configuration and/or other ProEst input and support. Based on the results, ProEst is ready to go live in the client environment. This is an important milestone for long term success!

WHAT WE'LL ACCOMPLISH IN STEP 5:

- ☐ Determine if we have addressed any outstanding issues or client concerns
- ☐ Determine if the client feels comfortable with the platform and its configuration
- ☐ Determine the competence of client-side executives, administrators and end users
- ☐ Determine if integrations have been identified, turned on and tested
- ☐ Determine if sample estimates have been completed and that the client is confident in their ability to rely on ProEst to create all new estimates moving forward

6 GO LIVE

ENSURING THE LONG-TERM SUCCESS OF EVERY CLIENT

In many ways, the conclusion of the ProEst implementation cycle marks the beginning of an important new chapter of client support, interaction and care. With ProEst serving a vital new role in our client's daily estimating activities, we have forged an important business partnership —and will continue to contribute our insight, experience and knowledge of the ProEst platform to help ensure their long-term success.

Please note that our Client Success team will follow up with new clients on a weekly basis immediately following the "go live" date, as well as conduct 90-day, mid-year and third quarter reviews. We are always here to help during this vital go live step, so new users are encouraged to reach out.

TRACK SUCCESS

AS A COMPANY, WE ONLY SUCCEED WHEN OUR CLIENTS DO

No two ProEst clients—or implementations—are exactly alike. Once the system has been configured and is being actively used by estimators, it's essential for the ProEst Client Success team to measure client progress, address any client pain points or training deficits and provide remedies as needed.

Based on the results obtained, the ProEst Executive Sponsor, ProEst Client Success Manager, ProEst Implementation Manager and client-side stakeholders will regroup to determine what areas, if any, can and should be addressed.

WHAT WE'LL MONITOR:

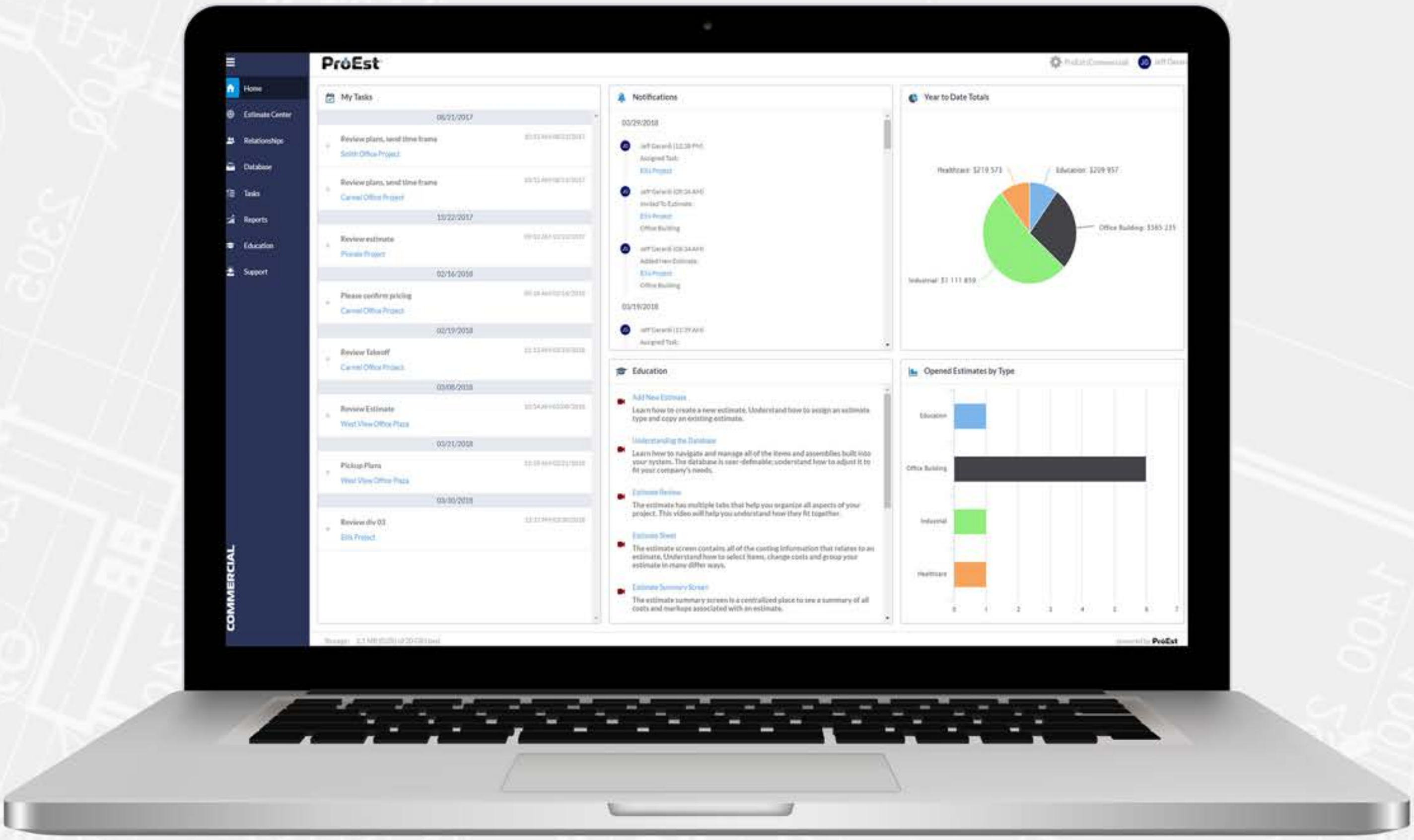
- ☐ Identify any users that demonstrate a need for further clarification or instruction
- ☐ Measure and track estimate completion time and accuracy
- ☐ Review user adoption and recommend needed training if necessary
- ☐ Evaluate potential process changes or configuration adjustments
- ☐ Measure and track estimate close rates

WHAT WE'LL RECOMMEND:

- ☐ ProEst best practices when we see they are not being followed
- ☐ Additional training if necessary

WHAT WE'LL COMMUNICATE:

- ☐ Any new functions or features coming soon
- ☐ Any time we are traveling to meet



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