

**CORPORATE SOCIAL RESPONSIBILITY**

# Implementation Overview

Roles, expectations, and timelines



# Meet your Trainer...

## Zoey Lake

Senior Training Specialist

Corporate Social Responsibility



# Agenda



The Client Onboarding Team



Goals and Scope



Project Methodology



Post Go-Live Model

# Who are we?

CyberGrants was founded in 1999 with the goal of enabling electronic corporate grantmaking. Later, we added employee engagement and volunteerism to the platform.

In 2021 CyberGrants, along with several other companies involved in fundraising and nonprofit facilitation, was acquired by Bonterra Technologies. As we move towards one unified Bonterra, you may see terminology and branding change, but our commitment to helping you reach your goals remains the same.

Today, you may see references to Bonterra, CyberGrants, and Corporate Social Responsibility or CSR.



# The Client Onboarding Team

# Bonterra Key Contacts and Stakeholders

<b>Project Manager</b>	Main point of contact for client onboarding. Will update you regularly on progress and timelines.
<b>Implementation Consultant</b>	In charge of the initial configuration of your account according to requirements
<b>Onboarding Director</b>	Point of escalation for Implementation Consultant and Project Manager
<b>Solutions Architect</b>	Gathers requirements and performs initial scoping during the sales and contracting process
<b>Business Analyst</b>	Gathers requirements and writes specs for all custom technical services
<b>Development Manager</b>	Point of escalation for Business Analyst and Technical Services
<b>Onboarding Architect</b>	Point of escalation for technical issues and changes in scope

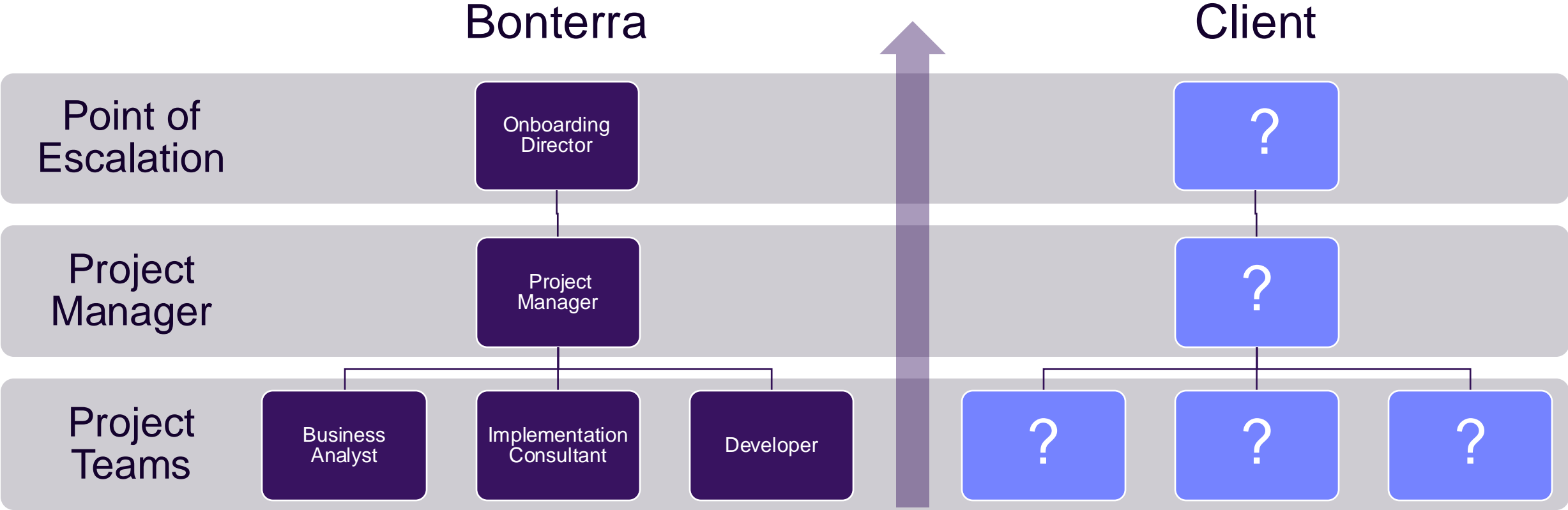


# Project Team RACI

	Initiation	Configuration & Development	Testing & Training	Launch!	Hypercare
Client PM	R	A	A	I	C
Client Technical Contact	I	A	C	I	I
Client Business Resources	I	A	A/C	I	I
Bonterra PM	A/R	A	A	A	A/R
Bonterra IC	R	R	R	R	R
Bonterra BA	R	R	C	I	I
Bonterra TS	I	R	I	R	I

R=Responsible  
 A=Accountable  
 C=Consulted  
 I=Informed

# Governance and Escalation Path





# Goals and Scope

# Goals & Scope

The scope of the implementation will vary client-to-client. Please consult your SOW for information about your implementation.

During your kickoff call and during your first configuration session you will be able to ask any questions you may have.

- What will be delivered to you.
- What information and documentation you will need to provide us.

***The goal of the Bonterra onboarding team is to implement all agreed upon deliverables in a timely manner and support the transition to the client management team.***

# Project Methodology

# Meeting Cadence

Meeting	Content	Attendees
Weekly Status	Review Progress this period Deliverable and Milestone Status Review Risks and Issues Plans for next period	<ul style="list-style-type: none"><li>• Client Project Manager</li><li>• Bonterra Project Manager</li><li>• Project Team, as necessary</li><li>• Bonterra Leadership, as necessary</li></ul>
Requirements Gathering Workshops <ul style="list-style-type: none"><li>• Scheduled for 2 hrs, 2x/wk</li><li>• Workshop-style requirements calls dedicated to Configuration and Technical Requirements</li></ul>	Define requirements for each aspect of the project.	<ul style="list-style-type: none"><li>• Client Project Manager</li><li>• Client SME</li><li>• Client Business Users</li><li>• Bonterra Project Manager</li><li>• Bonterra IC/Bonterra BA</li></ul>

# Our Project Methodology

## Initiation

 Plan Project

 Define Requirements

 Software Demos and Overview

## Configuration & Development

 Configure Programs

 Develop Customizations

## Testing & Training

 Test Software

 Train Business Users

## Launch!

 Launch

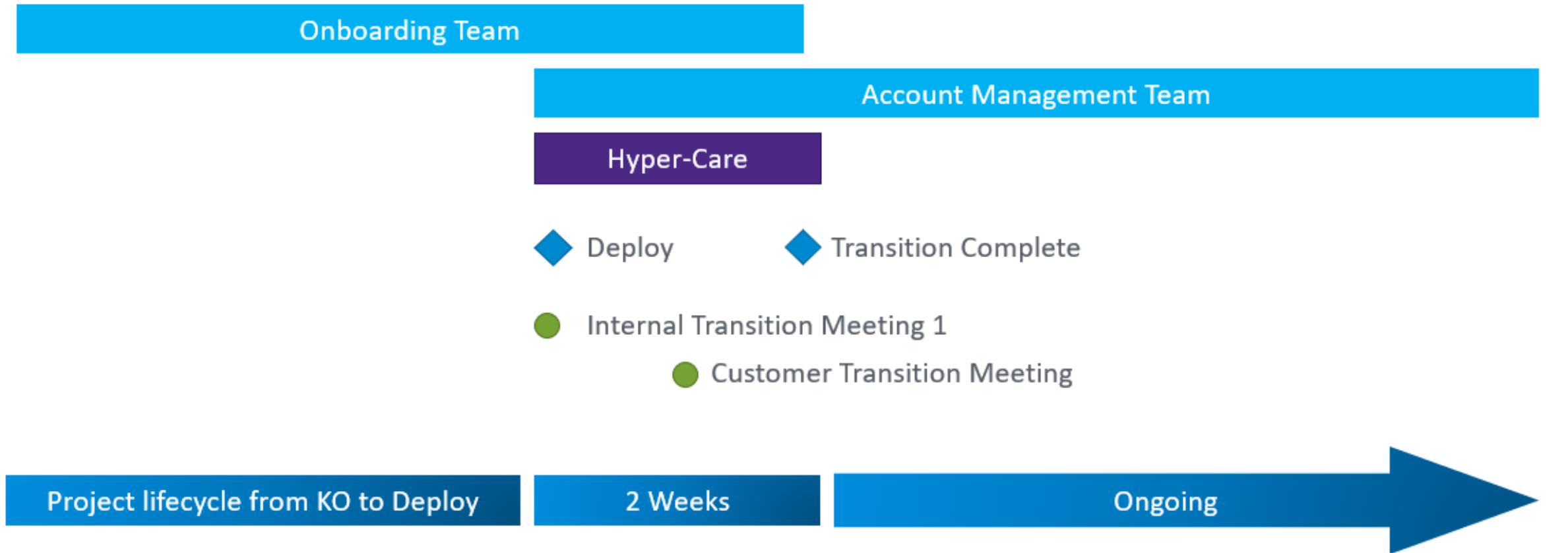
## Hypercare

 Support Intro & Project Closure

# Post Go-Live Model & Support

# Hypercare & Post Go Live Support

After successful project deployment, the Account Management Team will offer ongoing support.



# Next Steps

Client to provide escalation path contacts to Bonterra PM

Client to review provided documentation

- Standard Migration Specifications
- Standard Integration Specifications

Your Project Manager will reach out to you to schedule your project Kick Off call



# Q&A

# Feedback & Training Survey

Please fill out the survey (link in chat or scan QR code):



Thank You for Attending!

