Visier Technical Delivery Program

Onboard value to the business, with confidence and ease
To get you the answers you need to meet your business goals we will need to onboard and configure a selection of subjects that will enable you to realize your identified people analytic goals. This document describes how Visier will guide you through your technical delivery program for Visier People.

Delivering on Your Value Plan

As a solution with prebuilt content, making that content available in Visier is primarily a matter of preparing and onboarding the necessary data. Starting with your custom value plan, we have assessed which data sets (subjects) to onboard into Visier to light up the metrics and analyses needed to provide the answers you need to meet your business goals. These subjects are pulled together to create a comprehensive Solution proposal that lays out timeline and milestones of your technical delivery program.

Your first project will be Visier People: Organization. This data set will unlock accurate insight into your organization, such as headcount, employee starts and exits, organization, and reporting structure. These insights will be available to you and your users immediately upon completion of this initial project. Each subsequent project will enable insights related to new subject data sets, unlock more and more content for you to use, and allow you to explore new areas of value as you go.

Technical Implementation Approach

Visier employs an iterative approach to data onboarding and solution configuration. This approach enables your team to quickly realize value without overwhelming your resources, and allows us to continually augment the insights available to you. The technical project implementation will onboard the subject areas in the sequence identified in your Solution Proposal to meet your business needs at a pace that fits your resourcing availability and key organizational events.
Technical Implementation
Program Structure

Upon partnering with Visier, your Visier Project Manager will reach out to you to schedule a kickoff for the program with both our team and yours. During the kickoff we’ll review:

- your value plan
- expected outcomes
- our proposed services delivery program

At the end of the meeting we’ll determine the start date for our first implementation project, Organization. Please ensure that your project team can attend this kickoff so that we can start everyone off on the same page.

All technical projects require support from the following customer roles:

- Project Manager
- Data Analyst
- HR Analyst
- Business Analyst
- Executive Sponsor
- IT Analyst and Security expert (if required to create and schedule data extracts)
- Systems Admin
- Adoption and Engagement Lead

For a complete description of recommended project team members, please refer to your Welcome package. Supporting you on the Visier side will be:

- Visier Project Manager
- Visier Business Intelligence Consultant
- Visier Solution Architect
- Visier People Analytics Consultant
For each Implementation project, we will follow the cycle of Prepare, Onboard, and Deploy. The following sections will describe the activities and milestones that occur in each stage and the project team members that should participate.

### Technical Implementation Projects

#### Kick Off
- Confirm timelines and setting expectations

#### Delivery
- Prepare, Onboard, Deploy

#### Adopt
- Review Visier data dictionaries in workshops
- Provide access to Visier instance
- Identify and map source system attributes
- Identify and document transformation and cleansing rules
- Validate extract file schema
- Design Data Load routine and load data
- Configure Visier to align with customer needs
- Walkthrough available content
- Tailoring of content to fit your business
- Author initial content providing specific insight into business goals

#### Realize Value
- Identify and map source system attributes
- Identify and document transformation and cleansing rules
- Design, develop and test extract packages
- Validate extract file content
- Validate the data in the application against the data in your files
- Automate process to send integration files to Visier Data Center

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**Visier Tasks**

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Kick off the technical program by confirming timelines and setting expectations.
During the prepare stage of a project, both your team and the Visier team will prepare to implement the new subject area:

**Kickoff**
With each project purchased, a kickoff call will be held with all participants to set expectations, process, and approach across the teams.

**Data Discovery**
Building upon information gathered in your pre-sales Solution Assessment, one or more data discovery calls will be held with your Visier BI Consultant to determine business and data requirements as they relate to the subject being onboarded. This step ensures that the implementation will meet the business objectives set by your sponsor.
During the Onboard phase of your project, Visier will load and review your data, which is followed by customer validation. This stage may require multiple iterations to ensure both data quality and functional requirements are fulfilled for your analytics.

### Sample Data Extract

Your Data Analyst(s) will work with your team to extract the sample data following the guidelines identified during data discovery.

### File Preparation

Visier will work with you to define the file format, encoding, and data transfer process.

### Load, Analyze & Configure

The Visier team will load your data into the Visier application and review it against the files provided to confirm accuracy. Then we’ll set any initial data transformation rules and configurations. We’ll demonstrate the application and the features, visualizations, and metrics that have been enabled with this data load to help your team understand the usage and functionality of this portion of the onboarding.
<table>
<thead>
<tr>
<th>Validate with Sample</th>
<th>Your team will validate the data and the solution to ensure that they support your business objectives.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify the Areas to Correct</td>
<td>Together we’ll identify what needs to be corrected and how to correct it. If new transformation rules are required, Visier will document the changes.</td>
</tr>
<tr>
<td>Introduce Process Changes</td>
<td>Based on the assessment, you may need to make revisions to the file extract.</td>
</tr>
</tbody>
</table>

You will provide new data files if required and Visier will load the revised sample file and we’ll run through the above steps again until...

<table>
<thead>
<tr>
<th>Approve</th>
<th>Your team confirms that the agreed data quality and functional requirements have been fulfilled and application is approved to move forward with the full data load.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lock Configuration</td>
<td>Visier locks the approved configurations for this subject area.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Extract Full Dataset</th>
<th>You’ll extract the full dataset.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Load and Test</td>
<td>Visier will load the full dataset and test the application.</td>
</tr>
<tr>
<td>Validate the Application</td>
<td>Your HR Analysts will validate the application again with the full subject dataset in place.</td>
</tr>
<tr>
<td>Approve</td>
<td>Your Executive Sponsor signs off that the data and application are approved to move both data and configurations to Production for Go Live.</td>
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</table>
With the application and data validated and approved, we’ll move forward with deployment of this subject to your Production environment.

### Publish to Production
You’ll publish your project to your production environment.

### Create User Content
We will create a tailored guidebook with analysis focusing on the business outcomes and strategic initiatives identified in your value plan.

This step may not occur in every cycle.

### Configure and Test Security
Configure security roles and confirm that they’ll meet your organization’s governance needs.
**Configure Schedule and File Set**

Visier will set up the regular data load schedule and the configurations for the incoming file sets.

**Start Sending Automated File Set**

Set up the automated data extract and staging.

**Automated Publishing**

(Optional) Set up the automated publishing.

**Support Transition**

Upon completion of a project, you will have more content available to you and your users in Visier People, and we will transition maintenance of that portion of the solution to the Visier Support Team.

**Close Project**

Both project teams will meet to review the project, surface lessons learned or things to note, close this project, and schedule the next one.

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### People Analytics Consulting

Included in your complete Deployment Roadmap Services proposal is content configuration to augment the delivered content with content tailored to show the business value of your data in Visier People. We will create a tailored guidebook with analysis focusing on the business outcomes and strategic initiatives identified in your value plan. Your Visier Client Executive and your Executive Sponsor can use this new guidebook to monitor the success of your Visier People subscription.

This step may not occur in every delivery cycle, but will be scheduled for the Deploy phase when it makes sense for your project. Your Visier Project Manager will schedule this according to your overall objectives.

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### Project Acceptance Criteria

Projects will be closed when:

- Data for the package has been loaded
- Visier has demonstrated the new data and there has been a validation walkthrough
- The new dimensions, metrics, and visualizations are visible to users
- Data and the solution has passed validation:
  - The data in the application matches the data in the provided files (unless the differences are due to transformation or other predetermined changes)
  - The functionality of the application can be shown to meet the business requirements agreed to for the project
- The automated data load is in place, if required
- A tailored guidebook and analyses specific to your business objectives are available in your application
Completing the Program

Upon completion of the last technical project in your program, we’ll meet to review the implementation in its entirety, review any questions that you may have, and close the program. While this represents the end of the technical program of your Deployment Roadmap, you can contact your Visier Client Executive at any time to arrange the onboarding of new subjects, changes to your current setup, or strategic services to help you expand your use of Visier.