Onboarding Process in a Nutshell

The project implementation is expected to take up to 3 months

Yieldigo

1 Discovery

2 Implementation

3 Handover

4 Go-Live
Launch of Your New Yieldigo Software, Regular Usage, and Hypercare Phase

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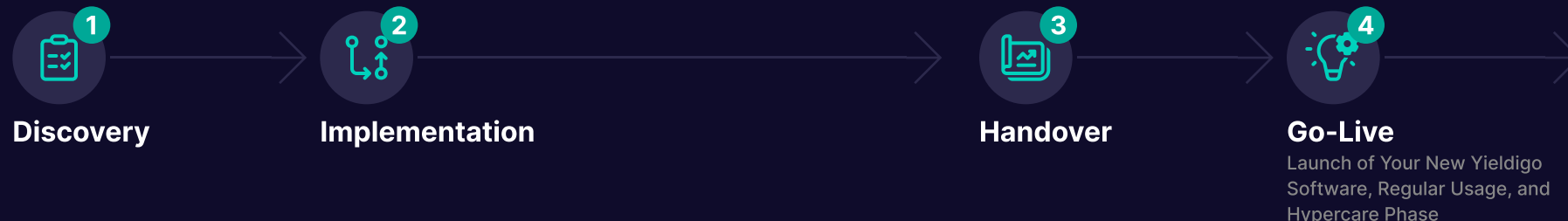
GOAL: Initial data samples cleaning and mapping, business setup discovery

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

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

The data mapping is clarified to initiate the delivery of data samples and cleaning iterations for the data integration.

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

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Implementation starts with the thorough data sample checks and consists of 2 steps:

Data integration is initiated with the environment creation based on the set data structure, followed by the data validation and cleaning iterations process. The business discovery sessions and pricing setup preparation workshops are ongoing, as this process goes hand-in-hand with data cleaning and clarification.

Software configuration begins after the pricing strategy setup workshops, which are conducted according to the agreed schedule. These workshops, along with supporting training materials, enable the client team to set up the pricing environment and configure the software to align with their business goals and requirements.

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

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The Handover phase consists of the repricing end-to-end process and data flow integration test, final touch-ups on the solution configuration setup, and usage Q&A sessions with the key users to guarantee smooth functioning for the Go-Live.

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

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

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

The Yieldigo Client Onboarding team guides the client through the whole process by conducting regular status 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.

The overall project duration depends on the complexity of the implementation scope and the intricacy of data integration.

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.