



# eSign Cloud Implementation Plan Overview

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## Introduction

Welcome to the IMM eSign family. We appreciate and value your choice of our advanced eSignature solution for your financial institution. We look forward to working with you to power the digital strategies and initiatives you have established for your institution.

We have designed a collaborative onboarding program comprised of a series of stages that will guide your navigation through the implementation, training, and preparation to take IMM eSign Cloud live within your institutional environment.

This Implementation Plan overview document is designed to provide you with an overview of the project flow and key milestones for the various stages and engagements of the project.

If at any point during the onboarding process you have questions, please share those with your onboarding project manager or your IMM regional client manager. Our team is ready to make sure your project is smooth, effective, and meets your individual business requirements.

## Approach

The self-paced learning approach to the implementation of IMM eSign Cloud provides an institution with control over the pace at which its employees will learn the materials needed to understand, implement, utilize, and support their solution. This program will allow you to move efficiently through the onboarding process at your own desired speed.

Onboarding IMM eSign Cloud consists of six core **stages** which are laid out in a logical progression according to our approach to a new implementation. In this way you are able to understand the process from start to finish and determine the best approach for your institution specifically with regards to timing and staffing.

Each onboarding stage uses a combination of self-guided lessons, activities, and assignments designed to provide you with the knowledge of the system fundamentals, concepts, and feature/functionality. After you complete each self-guided portion, our solution experts will then use their expertise to guide you through live consulting sessions, ensuring that you understand the concepts and fundamentals and how to apply those to your institution's specific business use cases and requirements.

Your onboarding project manager will be available throughout the program to help you navigate the various stages and to schedule your consulting sessions when you are ready.

Our goal is to provide you the tools and guidance your institution needs to take ownership of your IMM investment. While we are your partner in success, we also strive to enable you to stand on your own.

## Institution Project Team

Your team should contain individuals with the following roles. However, more than one role may certainly be filled by a single individual. It is best practice to have at least 4-5 different individuals making up the overall team.

- Project Manager
- Business System user/Subject Matter Expert(s) (for all business systems/processes)
- IT Resource assigned to this project
  - Azure AD Global Administrator (often the IT Resource)
  - Adobe Sign Administrator (often the IT Resource)
- eSign System Administrator(s) (often more than 1) – responsible for managing global settings, users, and permissions in eSign
- eSign Document/Template Administrator(s) (often more than 1) – responsible for creating and maintaining document templates in eSign
- Imaging System expert/administrator – to facilitate the archiving process decisions and setup

We recommended that **all** team members complete the training in all Stages of the Onboarding process and attend all live consulting sessions with the IMM product experts.

## Onboarding Stages

### Stage 1: Introduction

In this first stage, implementation team members at the institution obtain a solid understanding of what eSign is and what it looks like, as well as foundational elements to starting a new IMM eSign implementation project.

After all team members have completed the lessons and you have completed the required activities, you will participate in a **Kickoff** meeting with your IMM project manager. This meeting will be a level-setting call during which each of the stages of the implementation process will be discussed, requirements and expectations will be reviewed, and a plan and timeline will be determined.

#### *Customer Profile Form*

In the Stage 1 Resources you will find a link to a Customer Profile Form. Your team should complete this form to the best of your ability and submit it with your Readiness Form—it will aid the IMM Implementation team in preparing for your project.

#### *Readiness Form*

Each stage of the onboarding process will conclude with the institution filling in and submitting a readiness form located on the Onboarding website. It will be the submission of this form that will signal to your IMM Project Manager that you have completed the stage and are ready for the next activity with the IMM implementation team.

### *Project Management Calls*

IMM's Project Manager will schedule and conduct 30-minute weekly project calls to ensure the project is on target with all applicable parties (Institution, Business System, Imaging System, and IMM).

## **Stage 2: Getting Started**

In the second stage your team will develop a deeper understanding of the elements of eSign and prepare to participate in the installation activity and initial setup process. Though at a high level still, you will learn about security, permissions, document templates, signature interfaces, integration with imaging systems, and case studies. At the close of this stage, you will work with an IMM Installation Specialist to install all required eSign components in your environment.

### *Consultation*

After you complete the lessons in Stage 2 and submit the Readiness Form, you will participate in a 30-minute consultation session with your IMM Project Manager to address any questions you may have and to ensure your **readiness** for the installation activity.

### *Installation Activity*

The installation activity will be scheduled by your IMM Project Manager after your consultation session. This activity is generally scheduled for a **three-hour** block (but may take less time) and will include **critical** team members from your institution. Lesson **Five** in Stage 2 will focus on how to prepare and who to include in this activity.

## **Stage 3: System Administration**

Focused primarily on the designated individual(s) at the institution who will be responsible for managing and administering the eSign system, during this stage your team will get into the details of system administration and maintenance and will set up the system based on decisions you have made or will make about how the solution will function to best meet your business needs. Each lesson will have a set of tasks that your team will complete in preparation for a consulting session with an eSign expert.

### *Administrative Consultation/Training*

The Admin Consult will be scheduled by your IMM Project Manager after you submit the Readiness Form for Stage 3. This session will generally run about an hour and will give you the opportunity to work with an IMM Specialist to answer questions and clarify any potential areas of confusion.

## **Stage 4: Creating Templates**

In this stage, the implementation team will learn how to and begin to set up the templates that will be used by eSign to recognize documents being generated from business systems and uploaded to eSign. Prior to this stage, discussions around templates will have been generic, but now the specifics will be explored and implemented. Your in house project team will begin setting up templates on their own prior to the consulting engagements with an eSign template expert.

### *Template Creation Consultation/Training*

Like the Admin Consult, the Template Consult will be scheduled by your IMM Project Manager after you submit the Readiness Form for Stage 4. This session will generally run an hour or two depending on your needs and will give you the opportunity to work with your IMM Specialist to answer questions and clarify any potential areas of confusion.

## **Stage 5: User Preparedness**

Stage 5 represents the culmination of your time and efforts and ends with the training of your users and Go-Live activity. In this stage you will do your final round of testing, make any necessary adjustments, create your user training, and launch your solution.

### *User Training Consultation*

Like the Consults before it, Training Consult will be scheduled by your IMM Project Manager after you submit the Readiness Form for Stage 5. This session will generally run one hour and will give you the opportunity to work with your IMM Specialist to answer any final questions and clarify any last areas of confusion. Your IMM Specialist will also be available to provide you with guidance on training the solution to your users.

### *Customer Acceptance Testing*

Once IMM has installed and certified the system and the institution has completed the training stages and consults, a complete round of testing should be conducted by the institution before going live. The Customer Acceptance Testing (CAT) Matrix is a document that lists all of the elements of the system that must be verified as working as designed and ready for the training of staff and subsequent Go-live. The CAT matrix must be completed and returned to your IMM Project Manager prior to the live date.

### *Pre Go-Live Activity*

Just prior to Go-Live it will be important to ensure that all test transactions are purged from your system to ensure a clean eSign environment for your Go-Live date. IMM will provide guidance for you to do this on your own, or your IMM Installer can connect to your system to assist you.

### *Go-Live*

On your Go-Live day you will have dedicated support from your IMM team to help ensure a successful IMM eSign Cloud rollout.

## **Stage 6: Finishing Up**

In the final stage we focus on the ongoing maintenance and support of the eSign system and discuss strategies for maximizing the use of the system throughout your institution. We will also examine lessons learned and transition your institution to the IMM Support team.

After the first live implementation, you will have full access to IMM Support on an ongoing basis. Your IMM Project Manager will provide our support guidelines and contacts.

### *A Note about Support during Onboarding*

During the initial onboarding and implementation phase of your IMM product, your IMM Project Manager will serve as the point of contact for any questions, concerns, or issues that may arise. Getting you answers and solutions in a timely manner is a top priority and keeping track of your progress is key to the success of your project and of the whole IMM family. We ask that during implementation you utilize the dedicated Support Form linked at the top of each Onboarding page to submit your questions during this initial phase. We will reply to your submission within one business day and, if needed, assign a resource to work with you to facilitate a solution in a timely manner.

*We look forward to working with you and know both your employees and your consumers will enjoy the convenience and signing experience of IMM eSign.*