Taulia Customer Success

CONTENTS

1. INTRODUCTION

To assure the successful rollout of our Taulia programs, Taulia provides a team of experts, proven methodologies and business strategies that ensure value realization. This includes the successful implementation of our software, business process change management, and a supplier adoption plan designed to achieve your business objectives.

This document introduces the Taulia Customer Success Methodology which includes the activities and deliverables of each stage of the program life cycle, standard timelines, roles and responsibilities, and our best practices.

2. METHODOLOGY

The Taulia Customer Success Methodology is designed to be flexible and dynamic while offering a consistent experience. The methodology follows the international standard project guidelines outlined by the Project Management Institute (www.pmi.org) and has been developed based on Taulia's breadth of industry and customer experiences. The methodology is easily incorporated into the customer's master project management methodology if one exists. The methodology is consistently updated and evolved, based on our evolving professional experiences.

The Taulia Customer Success Methodology is designed to

- Focus on the achievement of the customer's business goals (value realization) with real, actionable data, through Taulia's proprietary data analysis engine.
- Provide a simple, repeatable, and flexible project framework including document templates, standard communication, tools, and processes.
- Utilize an industry-proven, cross-functional delivery model that provides seamless transitions between all phases of the customer life cycle.
- Facilitate a strong partnership between Taulia and the customer.
- Align with partners and their enablement efforts.

At Taulia, we pride ourselves on being a trusted advisor when it comes to the success of our customer's programs. Our implementation methodology is focused on supporting individual customer requirements and ensuring that our solution is configured accurately and with the highest quality. Beyond the technical implementation, our methodology includes the tools and artifacts needed to facilitate supplier communication, change management, education, and supplier outreach.

The ultimate success of the Taulia methodology is achieved through an establishment of trust, cooperation, transparency, and open communications. From technical implementation to program adoption, your Taulia program is a partnership.

3. PROGRAM LIFE CYCLE OVERVIEW

At Taulia, we live by the core value: "Customer Success is our Success". Our Program Life Cycle is focused on partnership. Our holistic design approach guides customers from our first encounter through the successful achievement of their business case. All our tools, documentation, communication, and processes focus on adding value and providing the information that is needed by our customers at each stage of the program.

FIGURE 1 - TAULIA CUSTOMER LIFE CYCLE

The Taulia Customer Success Methodology is based on a three-phase process model that is applied to every Program. Each phase has its own defined set of goals, milestones, activities, tools, and deliverables.

The Program Life Cycle phases include:

1. Implement:
    Focused on business program planning, technical implementation, program launch, and initial supplier outreach activities.
2. Accelerate:
    Ensures sufficient momentum is created with launch and adoption activities. The Accelerate phase covers specific program tuning and iteration activities including outreach campaigns, extended supplier integration work, and detailed engagement monitoring
3. Achieve:
    Leverages ongoing governance structure to formally track and monitor the path to credible and measurable program value and business ROI.

4. IMPLEMENT

4.1 Launch Stage

Program Launch begins when the customer is officially welcomed to the Taulia community. After a seamless pre-Sale to post-Sale transition, Sales will schedule a Welcome Call to introduce the Customer to their Customer Success Delivery Team.

The Taulia Project Manager will walk the client through a "**Welcome**" document which outlines what happens next. The customer is then asked to complete a "**Questionnaire**" document which requests specific technical and business-related information, inclusive of data samples, statistics, technical information, and current state process overviews. This information is needed to prepare for the upcoming Analyze stage.

The Taulia Project Manager will also develop a formal project roster, outlining all key stakeholders, align on organizational structure, and program tools, and agree on an initial timeline, schedule, and work breakdown.

Key milestones during the LAUNCH stage include:

- ***Sales to Customer Success Team Transition*** – This is an internal Taulia meeting where all the details of the program are reviewed internally, all artifacts are gathered, information from the Validation stage is shared, and the delivery team is formally established. On the customer side, it is expected that these same activities are taking place simultaneously.
- ***Welcome to Taulia*** – This is a meeting with the customer's program executive sponsor to introduce the assigned Taulia Customer Success delivery team and formalize the start of the partnership and collaborate on the upcoming plans.
- ***Customer Success Program Overview & Demo*** - Once the teams are aligned, the Taulia Customer Success team will present a formal Program kick-off call with the customer. During this call, all program roles and team members are aligned and a clear overview of the methodology, roles, proposed timelines, scope, and expectations of the program are socialized. A demo of the software is presented by the Taulia technical consultant as an introduction to the Taulia Platform solution.
- ***IT Technical Overview Call*** - The Taulia technical consultant will lead this call about the details of the technical requirements, expectations, and activities involved in the implementation of the Taulia Platform.

Key deliverables during the LAUNCH stage include:

- Welcome to Taulia Document
- Customer Success Program Overview Call
- IT Technical Overview Call
- Questionnaire Packet
    - [SAP only] Includes Taulia access and role information for your SAP environments
- High-Level Project Timeline
- Customer Roles and Responsibilities
- Project Contact List Template
- Supplier Data File Template (if not previously provided during the sales cycle)

During the Launch stage, the Taulia team will work with the customer's project team to plan dates for the requirements workshop that will signify the start of the Analyze stage. Once the workshops are scheduled, all the key meetings have been conducted, all completed "Questionnaires" have been delivered, and SAP Access has been arranged to the Taulia Technical Consultant, the Taulia team will facilitate an initial analysis of the deliverables and prepare for the Analyze stage to begin.

4.2 Analyze Stage

The Analyze stage begins with the preparation and execution of a comprehensive requirements workshop with the entire program team. The Taulia team will deliver the agenda for the workshop and align with stakeholders to finalize the agenda, content, and logistics. During the workshop, an important focus will be to ensure that the customer and Taulia program roles, assignments, and alignments of those team members are agreed upon and fully understood by all. The goal of these

workshops is to align on the specific technical expectations and business objectives of the program, ensure a full understanding of the customer's *"current-state"*, gather and present technical requirements, recommendations, and business strategy for the *"future state"*. The outcome of these meetings will be translated into a series of deliverables that will be the focus of the remainder of this Analyze stage.

Key technical deliverables during the ANALYZE stage include:

- *Requirements Workshop* - The Requirements workshop is typically held onsite at the customer location and lasts from 1 to 2-1/2 days, depending on scope.
- *Technical Specification Document (TSD)* – This document will outline all the configurations and technical specifics that are required for the solution design.

Key business deliverables during the ANALYZE stage include:

- *Supplier Segmentation and Opportunity Analysis* - Taulia's proprietary data analytics methodology assesses the opportunity for program adoption. This deliverable will be an input to the Business Program and Rollout Strategy.
- *Business Strategy Document (BSD)* - This document includes the initially agreed upon program goals, objectives, scope, communications plans, timeline for achievement, roll-out strategy, and recommendations for execution in the areas of working capital and operational efficiency.

It is important to note that each of the above deliverables represent a formal milestone of the program, but the TSD and BSD are dependencies for several of the Business strategy deliverables and therefore is the critical path during this stage of the Implementation phase.

Key project management deliverables during the ANALYZE stage include:

- Program Communication Plans including Reporting, Team Calls, and Steering Meetings
- Updated Implementation Project Plan
- Risk Log
- Enhancement/Change Log

(See section 7.0 Program Management for more details).

The formal agreement on each of these deliverables will be the focus of the remainder of this stage of the program.

4.3 Build Stage

During the Build stage the technical and business teams will develop all configuration and technical requirements (*See Technical Specification Document and Business Strategy Document for more details*).

Key technical deliverables during the BUILD stage include:

- *Configuration of the Taulia solution* – Taulia technical consultants work with the Customer's technical team to configure and integrate the Taulia Platform with the customer's ERP system in the Development environment.

- *Custom Code Specifications* - If applicable any customer-specific code that is developed during this stage will be documented and delivered.

While the technology is being finalized for the next stage, the Taulia Business Consultant is working with the customer business team members to support the implementation steps that were agreed upon during the Analyze stage.

Key business deliverables during the BUILD stage include:

- *Development of the Operational Readiness Plan and Marketing Collateral* - The Taulia team will kick-off the Operational Readiness effort by providing an overview of Taulia's proposed methodology and best practices as outlined in the Operational Readiness Overview document. The customer's Operational Readiness lead will work with internal key stakeholders to document the customer-specific Operational Readiness Plan, obtain resources, and execute the plan.
- *Development of Internal and Supplier Communication Marketing Collateral* - The Taulia team will provide templates of recommended marketing collateral identified in the Communication Plan. The customer is responsible for reviewing, fine-tuning, and ensuring all materials are approved for distribution within their organization and to suppliers. Internal communications include initiative awareness email, procurement training (and brochure), internal FAQ. Supplier communication may include initiative email announcements, supplier educational websites, and brochures to promote adoption. Samples of terms extensions letters and ppts are also available upon request.
- *Development of the Supplier Ramp Plan* – In line with the Business Program strategy, the Taulia team will work with the customer on a recommended supplier ramp plan.
- *Supplier Contact Validation* - The Customer will work to ensure email addresses for supplier invitations to Taulia will be ready in time for go-live. The Taulia team can assist in identifying methods for collecting and/or validating if needed.

4.4 Readiness Stage

The goal of the Readiness stage is to agree that the systems and the business are ready for the launch of the program. It is during this stage that the Taulia Program Success Manager (PSM) will be introduced. The PSM will work with the customer post-go-live to ensure the program ramps according to the documented strategy and achieves its intended goals. After an internal knowledge transfer led by the Business Consultant, the PSM will attend calls during this time to ensure a smooth transition.

During this stage, the technical teams will ready the environment for testing and start to prepare for User Acceptance Testing (UAT). The Taulia team provides template test plans to the customer and delivers education on how to use these templates to develop their own UAT plans. Taulia will support the customer throughout their test plan development.

Once the test plans are ready, Taulia will spend time at the customer site. Taulia starts by delivering a Knowledge Transfer (KT) to the UAT testers, IT & System Users as well as the Business Users. Taulia's goal is to make its customers as self-sufficient as possible by the end of the project.

As soon as KT has concluded, the customer UAT is kicked off. Taulia remains on-site to support those first days of testing and ensure that the testing process and user knowledge are fully established. UAT

will continue for the agreed period (generally 2-3 weeks). Issues will be logged, assigned, and addressed.

In parallel to the above technical tasks, the customer will be initiating their change management, communication, and any associated training plans. The Taulia team will provide the customer with support to ensure that the program and business are ready for the next stage.

Key technical deliverables during the READINESS stage include:

- *Sample Test Plan* – Taulia provides a template format of generic Taulia test cases. It is the customer's responsibility to create their own specific use cases and scenarios. This test plan is to be considered a tool for the customer to use in this exercise.
- *Guide to Creating an Acceptance Test Plan* – This document will be delivered and reviewed with the customer to help them align on the best approach to creating their use cases and test plans.
- *QA checklist -* This deliverable is a list of tasks that must be completed by Taulia Professional Services and by you the customer, to move your solution into QA.
- *Training Agenda/Material:* Taulia's Project Manager will provide a formal agenda and plans for the KT sessions. The material provided during the session will be a combination of standard presentation materials along with live demonstrated examples within the customer environment.
- *UAT Issue Log* – *Taulia will provide a format and access to a list that all can access to log issues and updates during UAT.*
- *UAT Acceptance Form* – By signing this acceptance form, the customer indicates that the scope of testing and success of the results are acceptable for production usage.

Once the customer deems the system ready for production and the UAT Acceptance Form is signed, the program is ready for the next stage, Go-Live & HyperCare.

4.5 Go-Live & HyperCare Stage

As soon as the technology and business are deemed ready for production, the technical teams will start to execute the production readiness activities that will be required to prepare the production-ready Taulia Platform. Taulia delivers a go-live checklist that will be followed by all who are involved.

Once the go-live checklist is complete, and the production environment is ready. The historical data load process is part of the production cutover activities, and it is triggered when the production environment is ready. This process loads the supplier data and associated invoice, purchase order, and payment history. Taulia requires that all the customer's active suppliers and data be transferred to the Taulia Network during this initial data transfer. This allows Taulia to provide data and supplier analysis support required for program optimization.

In addition, the Taulia team will begin facilitating the transition to the Taulia Technical Support teams. In preparation for supplier invitations to the Taulia Platform, a pre-activation email will be sent to suppliers to raise awareness of the program and a knowledge transfer to the Supplier Success team will be held to review the program specifics ahead of their outreach to suppliers to drive adoption.

The production activities are completed in the following sequence:

- *Initialization of all Supplier historical data on the platform* – All supplier master data, historical Purchase Orders, Invoices, and Payments are initialized to the platform including at least a 12-month look-back period. This data feeds Taulia's proprietary Data Analysis engine that allows for further refinement of your program and identifies gaps and actionable activities for supplier activation and outreach.
- *Handover to Taulia Technical Support* – Taulia's Project Manager and associated technical team will ensure that there has been proper preparation and transition to Taulia's Technical Support team. A formal meeting will be arranged so that an overview of the policies, process, and support teams can be introduced.
- *Handover to Taulia Supplier Success* – Taulia's Business Consultant and Program Success Manager will meet with the head of Supplier Success to review program goals, objectives, and parameters to prepare for outreach and education to suppliers.
- *[If SCF in scope] Introduction to Taulia FinOps team* – Taulia's Project Manager will ensure that an introduction to Taulia's FinOps team takes place. A formal meeting will be arranged so that an overview of the policies, and process on how to work with Taulia's FinOps team can be introduced.
- *End-to-End Pilot (Taulia as supplier)* – Taulia is invited as the first supplier. Once the Taulia supplier activation is considered successful, Taulia will assist the customer in assessing whether or not the organization is ready to launch the business program strategy and activate the key strategic suppliers that are required to meet your business case.
  - *For SCF programs, it is required before enrolling any customer suppliers to Taulia to complete an end-to-end pilot verification for each in-scope currency using Taulia as a supplier. This end-to-end pilot will validate each step in the early payment process, starting with supplier early payment and completed by repayment to the funder at invoice maturity. Taulia will provide detailed documentation and guidance on this process as we approach the go-live stage.*
- *Go-Live* – Once the end-to-end Pilot is successfully completed, suppliers will be invited to the program as dictated by the Business Program and Ramp strategy outlined in the Business Strategy Document (BSD).
- *HyperCare* – The Taulia technical team will continue to support the customer environment in production during a 30-day HyperCare period from the commencement of the Wave 1 roll-out until the environment has been successfully transitioned to Taulia's Technical Support team.
- *Technical Project Close* – Once the software has been successfully implemented and is stable, and the project has been handed over to the Taulia Support teams, the technical project will be formally closed.
- *Accelerate Phase begins* – After Full Go-Live starts, the Accelerate phase begins as supported by the Taulia Program Success Manager (PSM). (*See Section 5 for more details.*)

Key technical deliverables during the GO-LIVE & HYPERCARE stage include:

- *Go-Live Checklist* – This deliverable is a list of tasks that must be completed by Taulia and by the customer, to move your software into Production. They are categorized by items to prepare your environment for Production (Pre-Go-Live) and items to complete after you go live in Production (Post Go-Live).

Key business program deliverables during the GO-LIVE & HYPERCARE stage include:

- ***Pre-Activation Email Announcement*** – The email campaign, previously planned in the Build stage, will be executed, and sent to the designated suppliers. The email will contain a link to the supplier educational website where suppliers can find more information related to the business transformation initiative and the benefits of joining the Taulia Network.
- ***Supplier Account Activation Emails –*** The system-generated emails that are sent to suppliers to complete the registration process and activate their account on the Taulia Network.

Key project management deliverables during the GO-LIVE & HYPERCARE stage include:

- ***System Acceptance*** – Customer agreement signifies that the system is stable and ready to move to Taulia Technical Support teams.
- ***Introduction to Support*** – A formal introduction meeting with the Taulia Technical Support manager will be held.
- ***[If SCF is in scope] Introduction to FinOps*** (when SCF is in scope) – A formal introduction meeting with the Taulia FinOps team will be held to review business processes.

5. ACCELERATE

The Program Ramp Phase begins in sync with the activation of your key strategic suppliers during the end of the Go-Live & HyperCare stage. During this phase, the Taulia Program Ramp Program begins. The program shifts focus from technology implementation to value realization and adoption.

During Taulia Program Ramp, the cornerstone is Taulia's proprietary data analytics technology which is visible on the Taulia Platform for all users. The Program Success Manager will work with the customer to conduct analysis that generates critical program insight and meets with key business owners on a regular basis to drive the actions that build momentum and maximize results for the Customer during this phase. The objective of the Program Ramp Phase is for the Taulia Program Success Manager to align and partner with the key business owners for the highest achievement of value in the shortest timeframe. The Program Ramp Phase and focused assistance from your Program Success Manager typically last around 4-6 months.

Taulia's Program Ramp leverages a structured, iterative approach to systematically define, measure, adjust and improve each of the program levers to ensure the fastest path to value. Importantly, Taulia Program Ramp ensures that these activities are all based on actual data and results from the program after it launches versus conceptual data or metrics.

The program includes:

- Assistance from a Program Success Manager to help focus attention on highest value areas
- Access to Taulia's proprietary Data Analytics Technology
- Access to Taulia's Supplier Success team to execute recommended outreach and education campaigns
- Access to Taulia's marketing technology to execute recommended marketing campaigns

6. ACHIEVE

Once the Program Ramp phase is complete, the Achieve phase begins. During the Achieve phase, Taulia concentrates on putting the processes in place that continue to grow your program, achieve your business case, and manage your program long-term.

Technical support questions are addressed (for Customer and Customer's Suppliers) through tickets submitted to Taulia Technical Services. The Program Management team continues to engage with the customer on a recurring basis to ensure the program continues to evolve successfully and deliver results.

The Taulia Customer Technical Support Policy is accessible via the "Buyer Policies" link at support.taulia.com. Taulia offers two levels of Buyer support classified as Standard and Premier support. See the Taulia Order Form for your selected support level.

7. Program Management Methodology

From the moment program commitment and a partnership is established, Taulia's team begins to work with customers to establish the details around the schedule, communications, and identifying the engagement model.

Taulia's methodology tools, structure, recommendations, and techniques ensure that we have clear governance established that will provide expectations and drive initiatives efficiently on a day-to-day basis. The following sections describe the Taulia program management organization, roles, key project activities, deliverables, and responsibilities.

7.1 Human Resource Management

7.1.1 Customer's Cross-Functional Team Roles
Members of the customer project team should represent a diverse cross-section of the customer organization. They should bring a wealth of organizational expertise and knowledge. They each will have their own perspective on the current business processes and supplier interactions and relationships. These team members are the subject matter experts that assist with understanding current processes, gathering correct requirements, and adopting the future processes.

Once your Project Team is in place, you now need to think about assigning resources to the effort. There are three major work streams that will need to be staffed; (1) the technical implementation of the Taulia Platform, (2) getting your internal organization ready to support the Taulia Adoption program, and (3) educating and on-boarding your suppliers. The Taulia Customer Success team will assist you in determining the specific roles that you will need to fill for your program.

NOTE: In many cases, one resource can represent more than one Customer Role. For example, the AP SME may also be the project manager. In these cases, the Level of Effort is reduced to account for overlap in activities, such as attending the workshop or status meetings, etc.

Core project team roles include:

Role	Responsibilities	Average Hours Per Week

Executive Sponsor	Ultimately accountable for the success of the program. Champions project and aligns cross-departmental teams. Provides guidance to Program Owner on corporate objectives/goals related to the project.	1
Business Program Owner	Owner of the overall Taulia Adoption program throughout the implementation and ongoing. Set clear expectations, champion the project, manage risk, point of escalation. In the case of Dynamic Discounting, gains approval of the program parameters including program weighted average (APR), hurdle rates (APR floors), and liquidity.	4
Payment Terms Initiative Owner (DD/SCF)	Works closely with the Business Program Owner and/or Manager to develop/approve the working capital strategy via payment terms extension. Capitalizes on buyer training opportunities with the Taulia Business Consultant and ensures objection handling, decision tree, and other items related to the initiative are in place. Manages initiative roll out including "warm introductions" of key suppliers to Taulia Supplier Sales. Tracks progress to goal and reports on results.	2
Enrollment Coordinator	Manages master list of suppliers, obtains missing email addresses, provides mailing lists for supplier outreach mailings, sends invitations, monitors enrollment, follows up with non-respondents.	2
SME - AP, Procurement, Treasury/ Finance, Vendor Management	Participate in requirements design, review, and approval; testing, training, and communicating to the team. Create test plans & test data. Attend Taulia knowledge transfer sessions, develop training materials, create and perform internal training. Become Taulia Super Users for the buyer's organization.	8
Project Manager	Manage project tasks, timeline & dependencies; cross-department coordination; project status reporting.	8
IT/Basis/Security (SAP)	Grants VPN access, implements Taulia POD or Taulia Direct, and establishes secure connections for data transfer. Import Taulia Transports, create SAP Roles and grant permissions, release transports, and code reviews.	2
ERP Integration Lead (AnyERP)	Coordinates data file extraction development from the ERP system to the Taulia platform.	8

FIGURE 2 – CORE TEAM ROLES

In addition to the core team roles, there are other important activities that should be considered during the successful implementation of your Taulia Platform program. These activities may be assigned to the core team, or you may bring in additional team members to fulfill these activities:

- **Communication**: Reviews/signs off on Supplier Outreach marketing collateral, develops internal communication plan, develops marketing collateral for internal distribution and custom supplier pieces.
- **Internal Change Management**: Manages overall Operational Readiness effort, develops plan, secures resources, creates marketing collateral, executes plan.

- **Business Process Analysis**: Develops understanding of current end-to-end business processes, performs impact analysis/designs future process, participates in requirements design, review, and approval.
- **Training and Testing Coordination:** Attend Taulia knowledge transfer sessions, develop training materials, create, and perform internal training. Create test plans, create test data, identify testers, manage testing cycles.

7.1.2 Executive Program Steering Committee

The Executive program steering committee is essential to a successful program. They are the people who are responsible for providing guidance and accountability for the overall success or and commitment to the customer's Taulia Program. The steering committee will drive the entire scope of the project as well as ensure commitment of internal project resources, accept project deliverables, and resolve escalated issues. The steering committee has the ultimate decision-making authority to resolve issues raised by the project team. The Steering Committee also provides the project team an escalation path for resolving the inevitable obstacles and challenges that will arise.

The steering committee should maintain a regular meeting cadence so that members can review the progress of the program and make sure that the objectives are on track. The Taulia methodology recommends that this meeting take place once per month. The Taulia team will work with the customer to agree on the scheduling, the format and content of these meetings.

7.2 Communication Management

During the Analyze & Definition phase, the communication methods and channels will be formally agreed upon and established with the Customer's Project Manager by the Taulia Project Manager. During the Taulia implementation, the following recurring communications and tools are recommended as part of the Taulia Program Methodology.

Communication	Recurrence
Project Status Meeting	Once per Week
Steering Meeting	Once per Month
IT Program Team Meeting	Once per Week
Status Reporting	Once per Week
Project Plans	Daily
Action Register	Daily
Risk Register	Daily/Weekly/Monthly
Issue Log	Daily/Weekly/Monthly

FIGURE 3 - PROGRAM COMMUNICATION PLANS

7.3 Risk Management

Risks are uncertainties, liabilities, and vulnerabilities that may cause a project to deviate from the defined plan. All projects carry some element of risk. The objectives of risk management are to minimize the impact of unplanned incidents on the project by:

- Identifying the nature, probability, and likely impact of potential risks before they occur
- Identifying and implementing preventive measures where possible
- Implementing contingency actions to deal with the risks when they occur

Risks may (and should) be raised by any team member during the program. However, these risks must be qualified as a risk and must not be confused with issues or action items. The team member should document the risk and present it to the project managers for review, planning and inclusion into the next risk review. All risks and associated actions will be reviewed as a part of the regular steering committee meetings.

7.4 Quality Management

Quality Management covers planning, assurance, and control of quality of the product and program deliverables. Program quality is controlled by quality audits (customer testing) and reportable metrics.

The Taulia methodology leverages our standard options and solutions as our recommended practice to ensure the highest quality of delivery. If customer specific enhancements or customizations are deemed required and are approved for delivery, they follow a comprehensive development life-cycle process to ensure that all possible impact to quality are mitigated.

Quality planning is based on an accurate description of program scope. The acceptance criteria are defined by deliverables and objectives of the program. These are agreed during the Taulia Analyze stage. Taulia provides an array of testing template, best practice processes and analysis tools for supporting the process of validating these criteria.

Taulia's quality assurance is achieved by:

- Proven Taulia Business Program Delivery tools, artifacts and templates
- Standard Configuration Options and Solutions
- Minimal and highly controlled customization options
- Agreed, measurable business requirements
- Standard User testing test plan development training and support
- Proven testing support procedures
- A two-tiered Taulia Platform approach: Quality Assurance (QA) and Production
- Structured and Comprehensive Knowledge Transfer prior to User Acceptance Testing
- Monitoring and controlling of any issues, changes, bugs, or enhancements
- Reportable Metrics of Business Program Output

7.5 Change Management

The Change Management Process is undertaken to ensure that each change introduced to the project environment is appropriately defined, evaluated, and approved prior to implementation.

Changes can occur when:

- Business requirements change from the initially agreed Order Form or TSD
- Errors, omissions, or inconsistencies are identified in the initial baseline plans
- Additional functionality is identified as a need
- The scope of work is reduced
- A risk becomes a reality
- Additional tasks are added to mitigate a risk
- Delays are caused by resource, business, or 3rd party constraints

Change Management will be introduced to this project through the implementation of the following process:

1. Identify and Submit Change Request

This process provides the ability for any member of the project team to submit a request for a change to the project. The requester:

- Identifies a requirement for a change to any aspect of the project (e.g., additional hours, scope, deliverables, timescales, and organization)
- Upon customer request the Change Request Form will be drafted by the Taulia Project Manager and distributed to the Customer to review and approve. The Change Request Form summarizes the change:
  - Description
  - Cost or timeline impact
  - Priority
  - Any supporting documentation
  - Approvals

2. Review Change Request

The Project team reviews the Change Request Form and determines whether additional information is required to assess the full impact of the change to the project time, scope and cost.

3. Approve Change Request

The Technical Project Manager will forward the Change Request Form and any supporting documentation to the customer for review and final approval by the Sponsors and Stakeholder Leadership.

4. Implement and Close Change Request

If the change is approved, the following will occur:

- An implementation date of the change will be identified
- A test of the change will be scheduled and performed
- The change will be implemented
- The change will be reviewed and deemed successful or corrective actions taken
- The change request will be closed

7.6 Program Timeline Overview

Taulia Customer Success Methodology has allowed our customers to implement the Taulia Platform standard solution in 4-5 months on average allowing the business program to get ramped up quickly and achieve a successful business case within 12 months. The Program Overview table below shows the average time required for different phases/stages of the implementation as well as the key resource activities and deliverables that will be expected during the overall program. Note that the timeline below is an example, and the actual implementation timeline is dependent on the scope, customer's resource availability, and commitment.

Week #	Program Stage/Phase	Program Milestones
1 - 3	Program Launch	• Welcome Call with Customer Sponsor and Project Manager • Program Overview, Demo and Kick-off Activities • Environmental Readiness
4 – 5	Program Analyze	• Requirements Workshop o Program Strategy and Communication Plan o Technical Requirements • Technical Specification
6 - 10	Program Build	• Configure development environment • Implement basic custom development • Develop Operational Readiness Plan • Supplier Contact Validation • Develop Communication Templates • Finalize Program Ramp Plan • Unit Testing
11-14	Program Readiness	• Introduction to Program Success Manager • Internal readiness communications and procurement training • Configure QA/Test environment • Onsite Knowledge Transfer • Integration/User Acceptance Testing
15-20	Program Go-Live & HyperCare	• Program Go-Live • Supplier Data Transfer • Production Pilot Test • Supplier Invitations • Project HyperCare • Introduction to Technical Support

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