

Meeting 3: Walkthrough

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Prep

☐ **Send Initial/Partial Data Import**

We find the Walkthrough Meetings most productive when we have some of your data in the application. It gives us an opportunity to have a focused discussion, share best practices and ensure we're meeting your needs. So, please import away.

☐ **Login to Sandbox**

Your account has been added to the Sandbox environment. Please login to ensure you have access to Resolver.

Homework

☐ **Early Validation: Looking at Resolver through the eyes of an end-user**

The secret sauce in helping achieve your goals through Resolver is getting your team members (both administrators and end-users) an easy-to-use solution. A great way to help achieve this is to get into the application and take a preliminary look at what we're personalizing so you can start validating and ask yourselves:

- What data do we want and why?
- How and who will be using this data?
- How do we make capturing data as easy as possible?
- Do we need to add guidance to help users fill in data?
- Would an end user understand what data they need to provide?
- Does the personalization solve what we are after?

☐ **Validate Library Data**

As you're thinking about the user experience and validating the application, we also ask that you confirm the data we've imported. Is there anything missing? Is it accurate? This will become the data we import into your production environment so it's crucial to review it and ensure it is accurate and complete.