

Meeting 4: 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.

☐ Application Review and Feedback

As you started walking through the application after the Overview meeting, you may have some initial thoughts on the personalization you think will be of most value to your company. You may also have general questions. Please come prepared to the Walkthrough meetings with any questions and we would love to answer them for you.

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?

☐ Prepare for Validation

As we wrap up our Walkthrough meetings, it will be important to start preparing for validation and getting your Testing team ready. Validation is one of the most critical factors of success in any project. This is where you start testing through the lens of the business user to ensure the application is meeting your goals set out during the kick-off meeting. This is viewed as the most time-consuming task but done right and it ensures the overall acceptance of the application. You wouldn't drive an untested car so why would you use an application that hasn't been properly tested?

Here are some items to help make sure your Validation is a success:

• We advise at least 3 end-users are involved in validating the application. If you are implementing additional applications, you may need more testers. Please feel free to talk



through it with your Consultant on what we recommend for your situation.

- Although your testing team will be primarily made up of the implementation team, it's
 important to include a few testers who have not been involved in the project thus far. This
 is a great way to get their feedback and buy-in early.
- Ensure the Testers are included in the upcoming Training Meeting.
- It is also a best practice ahead of the training to ensure you have communicated to the Testing team how the application impacts them when it's coming and what the benefits are of the new application to their day-to-day role. We also recommend they watch the Resolver Application video so they have seen the application before they begin validation.
- It is recommended to assign a Test Lead whose role is to gather feedback from the Testers.

 They will ensure business-specific questions are discussed within your team and they will log any application-specific questions into the Project Tracker.
- The biggest factor for a successful Validation is time! You'll want to make sure the testing team has dedicated time blocked in their calendars to test the application.