

Need prior to implementation:

- ___ **Project Team** form (page 7).
- ___ **Server Readiness** form (page 8).
- ___ Verify that all workstations meet **Minimum System Requirements** (page 8)
- ___ **Existing Data for Conversion or Import** form (page 10) filled out for data that should reside in new database.
- ___ List of Products, Main Competitors, Lead Sources (page 10, if you plan to use Opportunities in ACT!)
- ___ Backup copy of all production and remote databases and associated files with the associated Administrator Login names and passwords.

Need Samples (emailed or on disk) of...

- ___ Company graphics
- ___ Company letterhead
- ___ Company fax cover sheet
- ___ Copy of all stock sales letters
- ___ Sample Quotes
- ___ Print existing/proposed sales reports; pencil in any modifications desired
- ___ Company envelope and any pre-printed mailing labels

We will fill out together...

- ___ Workstation Setup Decisions (page 11)
- ___ **Password Policy** form (page 11)
- ___ **Limited Access Team Definition** form (page 12) filled out if users will not have access to all information, but will have access by team names.
- ___ **ACT! Workstation Setup** form (page 13) top part filled out for each ACT! user

ACT! Beta Pilot Team (if requested)

This individuals will be responsible for testing the ACT! prototype in a beta environment. They will report changes and be responsible for the project moving to a working environment.

| Name of Beta Team Member | Role in the Team (Facilitator, Lead, Project Manager, User) |
|--------------------------|---|
|--------------------------|---|

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.