3E

STRATEGIC PLANNING FOR SUCCESS

The Project Quality Model Strategy Phase

THOMSON REUTERS™

PROVIDING A SUCCESSFUL STRATEGY FOR YOUR FIRM

Converting to 3E® isn't just a transfer of data. It is also an opportunity for your firm to realign processes to plan for the future. Thomson Reuters Elite's structured and tested implementation procedures ensure that the project is aligned with your business strategy and that you can quickly gain the benefits of 3E innovation.

Thomson Reuters Elite appreciates the investment in time and resources that clients make when purchasing our solutions. In order to protect your investment, Thomson Reuters Elite's Global Services uses our Project Quality Model (PQM) to ensure that your conversion to 3E is a successful one. The Project Quality Model provides Thomson Reuters Elite consultants with a process that ensures the efficient delivery of our solutions to our clients.

An integral part of the PQM process is the Strategy Phase, in which comprehensive analysis, planning, workshops, and documentation take place to ensure a smooth transition. This brochure explains the Strategy Phase and tells you what to expect at each stage of the process.

Thomson Reuters Elite is dedicated to providing our clients with solutions that help them face today's challenges within an increasingly competitive business environment. To accomplish this objective, we offer clients a comprehensive suite of implementation services. From business process consulting, solution design, and specialized technical services to ongoing support, education, and training, Thomson Reuters Elite Global Services are here to help you and your firm every step of the way.

AN INNOVATIVE AND GLOBAL LEADER

Thomson Reuters Elite offers an end-to-end Enterprise Business Management Solution that allows law firms and professional services organizations to run all operational aspects of their firms including business development, risk management, client and matter management, and financial management.

For over 60 years, we've demonstrated we understand the business and financial aspects of firm operations with proven tools that streamline processes to increase visibility and workflow efficiency across the organization and provide the flexibility to change and grow your business.

PHASE I	PHASE II STRATEGY						GATE 1	PHASE III EXECUTION		GATE 2		SYS LIVE	PHASE IV
VISION	TECH	FUNC	CONV	DEV	USER	PM		DEV CYCLE 1	DEV CYCLE 2		PROD CYCLE		CLOSURE & TRANSITION

A TEAM OF EXPERTS COMMITTED TO SUCCESS

At Thomson Reuters Elite, quality client service is not just a phrase—it's a way of doing business. That's why our Global Services team is comprised of some of the most experienced personnel in the industry. With decades of experience of working in the legal and professional services industry, our team provides a blend of domain knowledge and market sector expertise that is second to none. By using a comprehensive project management life cycle approach, we ensure our clients a successful implementation from planning to deployment.

Thomson Reuters Elite Global Services consists of the following four consulting groups based upon their respective disciplines:

PM   Project Management Group

AC   Application Services Group

TC   Technical Services Group

CC   Conversion Services Group

THE STRATEGY PHASE COMPONENTS

PHASE II STRATEGY

TECH | FUNC | CONV | DEV | USER | PM

Thomson Reuters Elite's world-class approach to project management, the PQM, provides a clear roadmap of the entire project and defines the overall project scope, critical production milestones, key deliverables, and anticipated results.

The Strategy Phase is an integral part of the PQM process. It consists of the following six components:

Technical Strategy

Functional Strategy

Conversion Strategy

Development Strategy

User Strategy
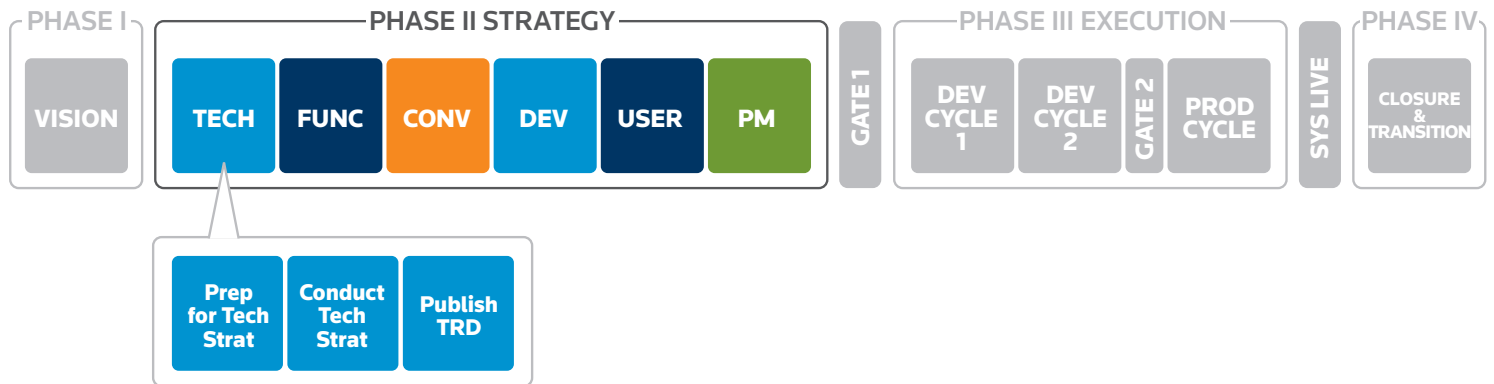
Project Management Strategy

At the beginning of the Strategy Phase, Thomson Reuters Elite consultants work with your team to research all aspects of your firm and its processes in order to prepare a package of Requirements Documentation that clearly illustrates your firm's business needs for implementing 3E.

TECHNICAL STRATEGY
REVIEWING ARCHITECTURE AND SYSTEMS

PHASE I	PHASE II STRATEGY						GATE 1	PHASE III EXECUTION		GATE 2		SYS LIVE	PHASE IV
VISION	TECH	FUNC	CONV	DEV	USER	PM		DEV CYCLE 1	DEV CYCLE 2		PROD CYCLE		CLOSURE & TRANSITION

Prep for Tech Strat | **Conduct Tech Strat** | **Publish TRD**

In the Technical Strategy, several steps are completed to ensure that your firm's technical infrastructure is ready for 3E.

- Thomson Reuters Elite consultants meet with your staff to introduce them to the 3E framework.

- Thomson Reuters Elite consultants review the 3E system requirements covering the following areas:

  - User base and planned usage (how many fee earners, accountants, conflicts users) are reviewed

  - Network infrastructure (how many offices, where are they located, use of WAN acceleration technology, bandwidth latency, etc.)

  - Server configuration

  - Directory services (use of any active and remote directories)

  - Existing assets of software, licenses, data, and hardware (what is your current legacy system, how large is your financial database, how old is the data, etc.)

  - Any existing hosting solutions

  - Disaster recovery/business continuity planning (backup plans in the event of data loss)

  - 3E virtualization policy

At the successful conclusion of the Technical Strategy, the following deliverables are provided by the Thomson Reuters Elite Technical Services Group:
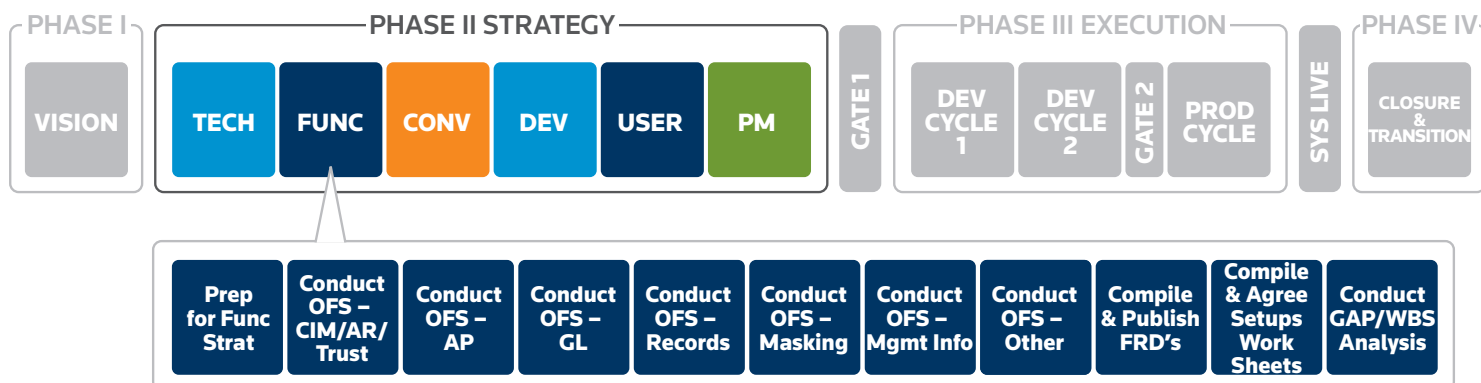
A Technical Requirements Document (TRD) consisting of:

- Development System Product System Requirements (PSRs) (for early stages of project)

- Production System PSRs (for live operations)

- 3E Deployment Matrix Sheet

- Other technical network architectural considerations

FUNCTIONAL STRATEGY

UNDERSTANDING YOUR BUSINESS FUNCTIONS

PHASE I	PHASE II STRATEGY						GATE 1	PHASE III EXECUTION		GATE 2		SYS LIVE	PHASE IV
VISION	TECH	FUNC	CONV	DEV	USER	PM	GATE 1	DEV CYCLE 1	DEV CYCLE 2	GATE 2	PROD CYCLE	SYS LIVE	CLOSURE & TRANSITION

Prep for Func Strat	Conduct OFS – CIM/AR/ Trust	Conduct OFS – AP	Conduct OFS – GL	Conduct OFS – Records	Conduct OFS – Masking	Conduct OFS – Mgmt Info	Conduct OFS – Other	Compile & Publish FRD's	Compile & Agree Setups Work Sheets	Conduct GAP/WBS Analysis

The second component of the PQM Strategy Phase consists of the Functional Strategy Sessions. This consists of a suite of modular-based process flow workshops designed to improve the project team's understanding of your business and how to best position 3E in order to meet your business challenges. The workshops are comprehensive in nature covering such 3E modules as Client Invoice Management (Billing), Accounts Receivable, Collections, Trust Accounting, Accounts Payable, Purchasing, General Ledger, Fixed Assets, Records, and others as agreed upon.

Each modular workshop consists of the following structured program of analysis:

- Data flow
- Inbound and outbound integrations
- Data volume – existing and new
- Currencies and taxation
- Detailed process flows
- Month-end procedures
- Module level reporting

Working with your finance and business teams, our Application Services Group will conduct the OFS (Onsite Functional Strategy) workshop and the agreed results will be published in a suite of Functional Requirements Documents. This documentation brings together all the "To Be" processes for your business, as well as necessary setup information, such as GL codes and so forth. This in turn is subjected to a rigorous gap analysis with the goal of building a comprehensive Work Breakdown Structure for completing the execution phase of the project.
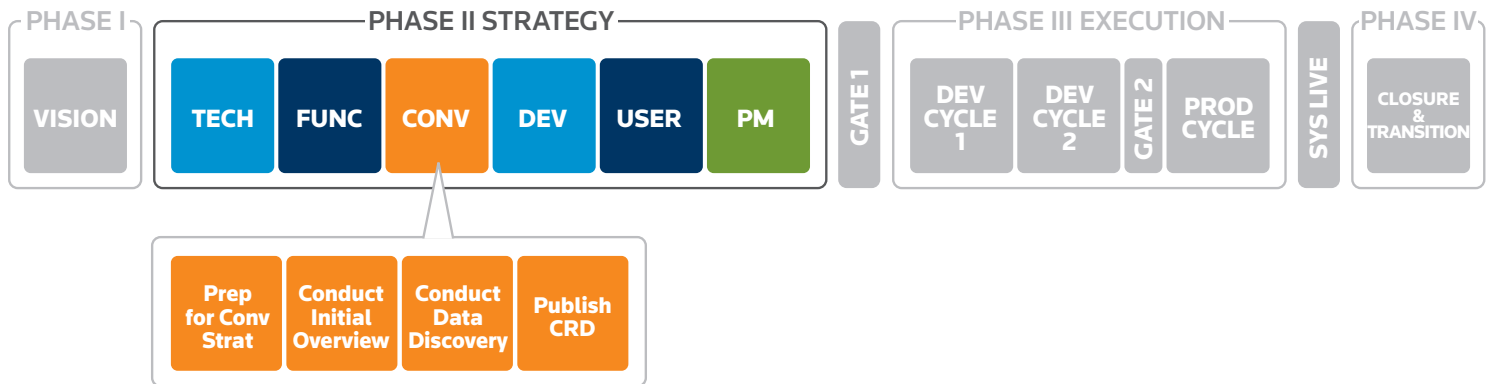
At the successful conclusion of the Functional Strategy, our Application Services Group provides you with:

- Functional Requirements Documents
- Setups Spreadsheet
- Gap Analysis

CONVERSION STRATEGY

SAFELY TRANSITIONING YOUR CRITICAL BUSINESS DATA TO 3E

PHASE I

VISION

PHASE II STRATEGY

TECH FUNC CONV DEV USER PM

Prep for Conv Strat | Conduct Initial Overview | Conduct Data Discovery | Publish CRD

GATE 1

PHASE III EXECUTION

DEV CYCLE 1 DEV CYCLE 2

GATE 2

PROD CYCLE

SYS LIVE

PHASE IV

CLOSURE & TRANSITION

The Thomson Reuters Elite Conversion Strategy is designed to develop a clear understanding of the project's conversion goals, its duration, resource requirements, and the technical challenges being faced. While all steps of the implementation are integral to the process, the data conversion process is at the heart of the entire implementation. In order for it to be a success, Thomson Reuters Elite's Conversion Services Group will work with your team to ensure that all parties understand their responsibilities as well as the timeline and procedures involved.

An initial overview meeting is held in order to review general conversion methodology. Team members are identified, and specific roles and responsibilities are assigned to ensure optimum communication and cooperation between all of the team members.

At the end of the Conversion Strategy, the Thomson Reuters Elite Conversion Services Group will provide your team with a Conversion Requirements Document which relays the requirements needed in order to ensure a successful data conversion.
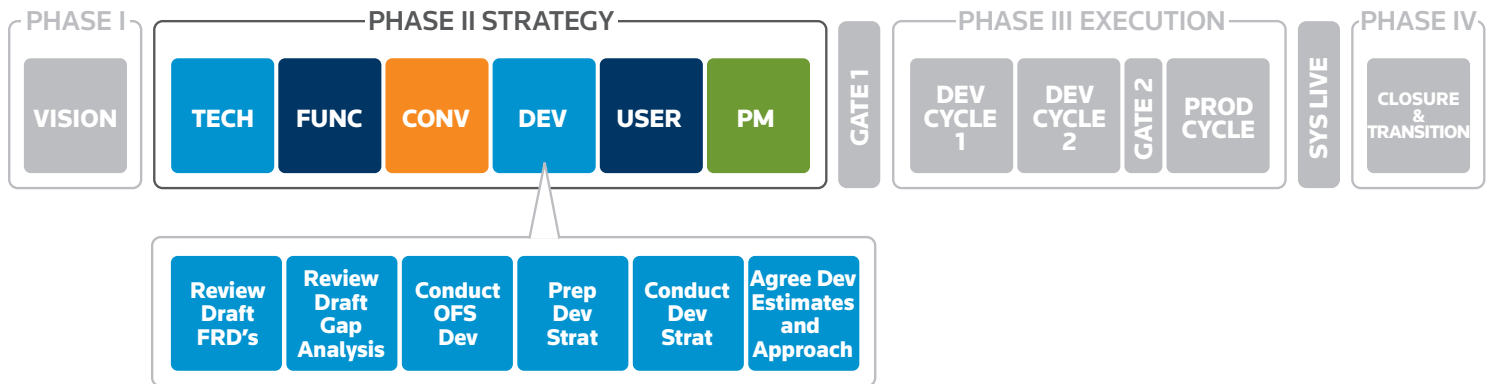
The actual conversion activities are:

• Data mapping preparation

• Data Discovery Workshop

• Production and validation of extract

• 1st test conversion

• Data validation and system testing

• 1st test review

• Repeat above steps for 2nd test

• Go live review

• Final conversion and output

At the successful conclusion of the Conversion Strategy, our Conversion Services Group provides you with:

• Conversion Requirements Document

• Data Discovery Report

DEVELOPMENT STRATEGY
TRAINING AND DEVELOPMENT APPROACH

PHASE I	PHASE II STRATEGY						GATE 1	PHASE III EXECUTION		GATE 2		SYS LIVE	PHASE IV
VISION	TECH	FUNC	CONV	DEV	USER	PM		DEV CYCLE 1	DEV CYCLE 2		PROD CYCLE		CLOSURE & TRANSITION

Review Draft FRD's	Review Draft Gap Analysis	Conduct OFS Dev	Prep Dev Strat	Conduct Dev Strat	Agree Dev Estimates and Approach

For the Development Strategy, our Technical Services Group will work with your team to understand any custom requirements identified during the Functional Strategy Sessions and to agree on appropriate solutions for meeting these challenges. During these sessions, a coordinated training and development approach will be produced with a view to ensuring that all identified solutions are delivered on time and on budget, while maximizing any opportunities that may exist for the transfer of knowledge from our Technical Consultants to your IT Team.

This collaborative approach not only provides for the efficient use of internal technical resources where possible, but also equips your IT Team with the skills needed to actively participate in the development of longer term solutions for your business, thus reducing the total cost of ownership for your firm over the lifecycle of the 3E product.

Outputs from the Development Strategy Session are:

• A Functional Development Log identifying all gaps arising from the functional strategies

• An agreed-upon development approach along with confirmation of all estimations

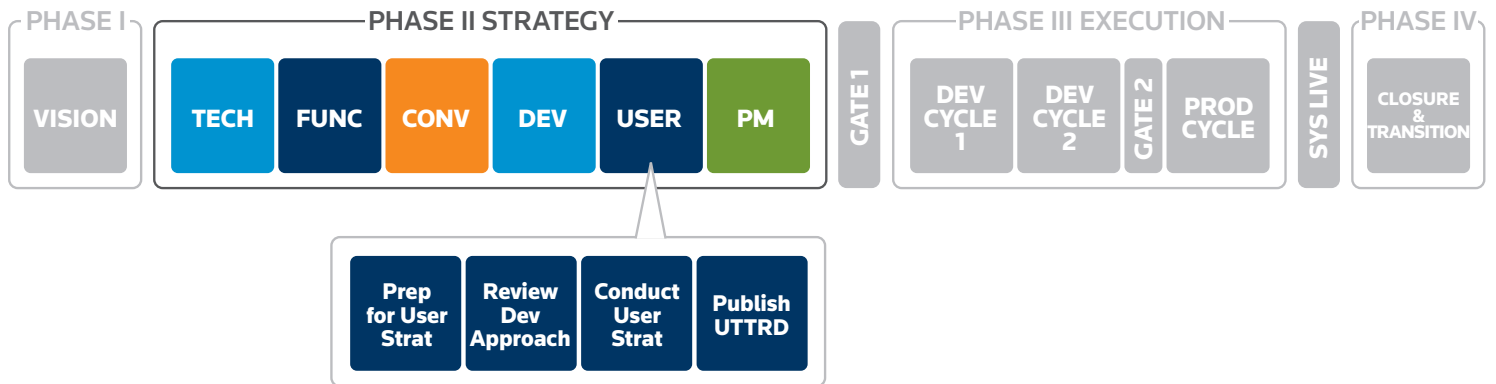• A tailored training plan for your IT Development Team

At the end of the Development Strategy, our Technical Services Group provides you with:

• The functional development log

• Training/Workshop Approach

• Development Approach

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USER STRATEGY
TRAINING AND TESTING PLANNING

PHASE I	PHASE II STRATEGY						GATE 1	PHASE III EXECUTION		GATE 2		SYS LIVE	PHASE IV
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Prep for User Strat	Review Dev Approach	Conduct User Strat	Publish UTTRD

The User Strategy is designed to identify the various user groups within your firm in order to ensure that they receive the appropriate training throughout the lifecycle of the 3E deployment. Our User Strategy also extends to the testing of the system to guarantee that all groups have adequate opportunity to thoroughly test and verify the 3E system at both a modular and framework level before it is released into production. Once live, the User Strategy also will ensure that there is adequate support for your teams both during the initial live phases and also for the month ends as required.

User Training

• Advanced Key Users

• Admin/Back-office Users

• End User – Fee Earners

Technical Training

• 3E Integrated Development Environment

• Microsoft® BizTalk® Integrations

• Crystal templates

Testing

• Pre-conversion Test
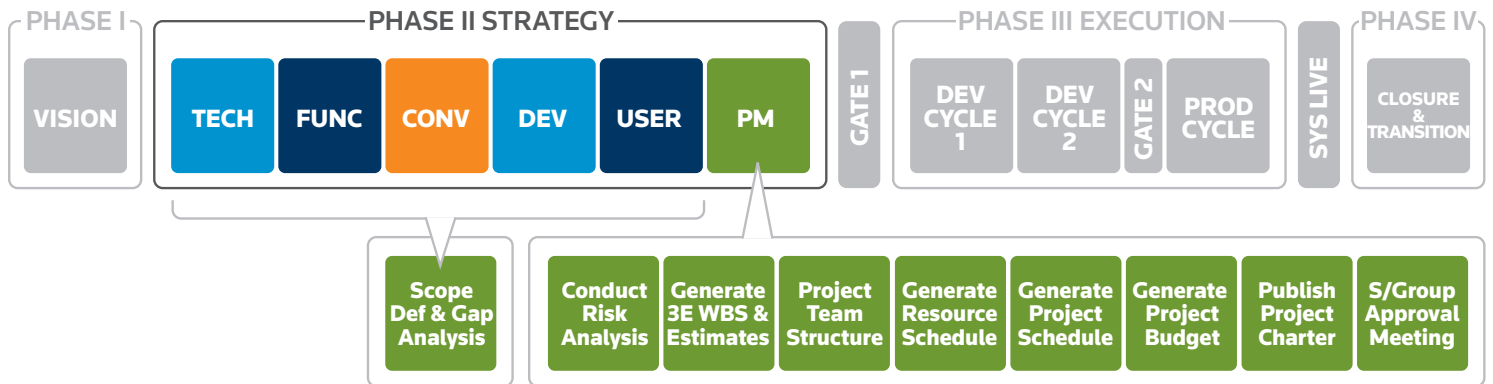
• UAT Round 1

• UAT Round 2

Onsite Support

• Live applications support

• Live technical support

• Month-end support

At the successful conclusion of the User Strategy, the Application Consulting Group provides you with:

• Training and Testing Requirements Document

• Training, Testing, and Support Schedule

PROJECT MANAGEMENT STRATEGY
PLANNING FOR SUCCESS

PHASE I	PHASE II STRATEGY						GATE 1	PHASE III EXECUTION		GATE 2		SYS LIVE	PHASE IV
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Scope Def & Gap Analysis	Conduct Risk Analysis	Generate 3E WBS & Estimates	Project Team Structure	Generate Resource Schedule	Generate Project Schedule	Generate Project Budget	Publish Project Charter	S/Group Approval Meeting

Project management is at the core of the Project Quality Model. The Thomson Reuters Elite Project Management Team and your project managers will work with the various teams to ensure agreement is reached regarding the planning, execution, and completion of all phases of the project. These include:

• Technical Requirements

• Functional Requirements

• Conversion Requirements

• Development Requirements

• User Requirements

Based upon the above, a gap analysis and work breakdown structure will be used to prepare "bottom up" estimations for the Execution and Closure & Transition Phases of the project, in conjunction with the initial Risk Assessment of the project.

At the successful conclusion of the Project Management Strategy, the Project Management Group will provide you with:

• Updated Project Charter

• Updated Project Budget

• Updated Project Schedule

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SERVICES THAT ENSURE LONG-TERM VALUE

As part of the Thomson Reuters Corporation, Thomson Reuters Elite leverages extensive technology, resources, and expertise to further broaden and enhance our range of products and services. We have formed partnerships with leading companies that offer best-of-breed technologies and services in order to deliver integrated, custom solutions to our clients. For example, as a Microsoft Gold Certified Partner, we enable seamless integration between our solutions and Microsoft platforms. It is partnerships like this that provide you with the solutions you need to automate your business processes, increase profitability, and achieve competitive advantage.

Thomson Reuters Elite is dedicated to the success of your 3E implementation and to help your firm quickly move from vision to actively using your 3E solution. The sooner your firm is equipped with 3E's robust financial and practice management solutions, the sooner your firm is on its way to becoming more efficient and more profitable.

YOUR PARTNER FOR SUCCESS

Thomson Reuters Elite offers an end-to-end Enterprise Business Management Solution that allows law firms and professional services organizations to run all operational aspects of their firms, including business development, risk management, client and matter management, and financial management. As an industry leader for organizations across the globe, we understand the business and financial aspects of firm operations, and we have the tools to streamline processes, improve efficiencies, and provide the flexibility you need to change and grow your business.

To learn more about 3E or for a global list of office locations, visit **elite.com.**

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