



Customer Implementation Readiness Checklist

One of the most important components of executing an implementation successfully is ensuring you and your team are ready and have all of the correct expectations of what is needed on Day 1. This checklist has been created to walk you through your responsibilities before the implementation begins. This allows you time to prepare and complete the appropriate tasks to lay the foundation for a successful implementation and ensures the implementation makes progress on Day 1 to realize value.

Category	Description	Outcome	Owner	Target Complete Date	Actual Complete Date
Requirements	Ensuring at least high-level functional and non-functional requirements are documented and approved by the Customer team. Reltio PS will share standardized MDM Requirements as a starting point.	The project team will have the requirements document to begin review and complete a Fit/Gap Analysis on schedule.	[Customer Owner Name]		
Data Profiling	Documentation of the data profiling results following the Data Profiling Best Practices	Clear understanding of data quality to help determine match rules and survivorship rules definition	[Customer Owner Name]		
Data Availability	Ensuring the Customer has secured a Production like data set for immediate loading into Reltio using the Velocity Pack configuration	Project team will immediately load to achieve the Data Awareness Milestone, and this will support development and testing with datasets that represent all data	[Customer Owner Name]		

		scenarios and conditions			
Reltio Training	Customer resources on the project team have completed Reltio Training per the applicable Learning Path in Reltio Learn	Foundational understanding of the Reltio solution to enable knowledge transfer from the implementation team	[Customer Owner Name]		
Integration Plan	A tool has been selected for loading data into Reltio and Customer has a plan for design and development of consuming systems	Allows integration development to occur in parallel with Reltio configuration to adhere to Reltio MVP Project timeline	[Customer Owner Name]		
Resource Onboarding and Access	Requirements to onboard Reltio & SI resources into Customer environment (VPN, VM, User ID, etc.) Requirements for access to Customer solutions, if needed	Identifies time/effort needed to onboard resources and accessibility to Customer solutions, repositories, etc	[Customer Owner Name]		
Access to Other Customer Solution(s)	Identification of Customer solution(s) that will be needed (during the project) by Reltio & System Integration (SI) resources. These include repositories, JIRA/Confluence/ etc., Source control,	Identifies time/effort needed to grant access for Reltio & SI resources	[Customer Owner Name]		

	messaging solution, etc.				
Security Requirements	Requirements of Customer Security / InfoSec group for Cloud solutions including Reltio. This may include IP whitelisting, Single Sign-On (SSO), use of Customer specific storage, etc	Identifies time/effort needed to set up proper security limitations	[Customer Owner Name]		
3 rd Party Licenses / Subscriptions	Finalization of agreements with 3 rd party data providers (enrichment sources) to support development and testing as well as understand any potential limitations (data, access, etc.)	Minimize delays due to lack of data from these sources	[Customer Owner Name]		