*Company Logo

<<ProductNameRemoved™>> Best Practices

The following Best Practices of an <<CompanyNameRemoved™>> <<ProductNameRemoved™>> ™ project were designed to ensure the successful outcome of each individual step of the project, therefore leading to a successful Implementation of the entire solution. The ability to ensure that deliverables are explained, understood by both responsible parties, and delivered in the time and manner agreed upon is advantageous to all. The following Best Practices will be ordered by each phase of the project.

I) Sales Process Best Practices

When contact with a prospective client has been made, the sales representative should immediately obtain pertinent information to be used in the demo of the <<ProductNameRemoved™>> ™ Solution. The Demonstration should be relative to the practices of the client in their current basic workflow. There is a collaborative collection of information to guide the sales representative through the initial demo. Listed below is how to obtain this information next to each Best Practice Point.

Use of Demo Database and Demo Script

For all first time demonstrations of <<ProductNameRemoved™>> ™, follow the basic script that was designed to ensure the prospective Client is shown the basic values and functionality of the product. The Demo Database has been populated with information from many specialties, and should be the first resource considered when available.

- ✓ Demo Server Link): https://DemoDatabase or local Demo Data base.
- ✓ Basic Demo Script https://DemoScript **(Item I.1)**

https://intranet.linkremoved

Gather Pertinent Information from the Prospective Client

This will help to better understand the needs of the Client, so <<CompanyNameRemoved™>> Practice Solutions Division may provide the best Product options and Professional Services to the Client as needed.

- ✓ Specialty of the Client, # of Doctors, # Of Users and Current Systems.
- ✓ Basic office workflow and Needs Analysis Form **(Item I.2)**

Needs_Analysis_Document_Final.pdf

(Pulling in a Needs Analysis Consultant for Larger Practices/ Multiple Facility Needs to determine if the Solution is a good fit.)

✓ Provider payment methods and other revenue-related topics.

Once this information has been obtained from the client, the sales representative should then be sure that the client is shown and understands how their basic current workflow would be performed within the <<ProductNameRemoved™>> Solution. This is of special importance should the prospective client be focused on how one area of the program will accommodate. **Expectations should be clarified.**

Provide the Client with **All** information needed to effectively make

a decision to purchase.

✓ Implementation Project Plan Outline **(Item I.3)**

https://implementationProjectPlanOutline.docx

Ensure that the client is aware that they will be assigned a project manager. Place a value not only on the training hours, but on the professional services provided to ensure a successful implementation.

✓ Hosting Options **(Item I.4)**

https://Hosting_Options_Final.pdf

Explain all 3 Options for hosting of the solution, along with the benefits of each. Best Practice for Hosting option is always Remote Hosting. The Information can be found in**.**

✓ Content Included in a <<ProductNameRemoved™>> Database **(Item I.5)**

https://HostingInfo_Final.pdf

Also Check Clinical Content Library for Templates pertaining to the Client's Specialty.

✓ Conversion Information **(Item I.6)**

https://ConversionItems.pdf

If a client is planning on purchasing a Data Conversion, this document will outline what will need to be pulled from their current systems, and what can be placed into the <<ProductNameRemoved™>> System. If any other material is requested to come over, the client will have to purchase a different type of conversion that shall be approved and outlined in detail in the Statement of Work.