





### 1 • Kickoff Meeting

#### CONTENT

- Company Introductions
- VEO Demonstration
- Review Current Assessment Practices and Processes
- Establish Goals and Timeline
- Develop Implementation Strategy
- Overview of Implementation Timeline

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#### ACTION

- Transfer of Sample Data

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#### ATTENDEES

- Director of Implementation
- Account Manager
- Customer Success Coordinator
- Customer Data Specialist
- Data Designer
- Estimator
- Sales
- Training Specialist



## 2 • Data Configuration

### CONTENT

- Define Data Exchange Process
- Identify Data Importing
- Establish Test Plan and Data Structure for Preferred Presentation
- Design Option Catalog Offerings
  - Estimated and Non-Estimated Products
  - Pricing and Group Level
  - Included Plan Features (standards)
  - Logo and Imagery
  - Marketing Names (communities, series, plans)
- Overview of Implementation Timeline

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### ACTION

- Data Exchange
  - Distribution of Templates
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### ATTENDEES

- Director of Implementation
- Account Manager
- Data Designer
- Estimator



### 3 • User Experience Design Meeting

#### CONTENT

- Product Catalog Adaptation Review
- Identify Modules and Feature Flags
- Discuss Training Opportunities
- Overview of Implementation Timeline

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#### ACTION

- VEO Access
- VEO Training
- Evaluation of Customer Feedback and Request

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#### ATTENDEES

- Director of Implementation
- Account Manager
- Data Designer
- Estimator
- Training Specialist

 **4 • Full System Rollout**

### CONTENT

- Review fully configured VEO Design Studio
- Establish Go Live Date
- VEO Training
- Final Rules of Engagement and Operating Procedures
- Introduction to Maintenance Procedures
- Overview of Implementation Timeline

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### ACTION

- All Business Units Trained
- VEO Access Across Organization
- Maintenance Mode

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### ATTENDEES

- Director of Implementation
- Account Manager
- Customer Success Coordinator
- Customer Data Specialist
- Data Designer
- Estimator
- Sales
- Training Specialist