



Business Implementation Services Overview

Implementation Methodology

SilkRoad follows an implementation methodology, which consists of three Phases: Discovery, Development and Deployment. The methodology contains industry and SilkRoad best practices and has been designed for the efficient implementation of our solutions and to take advantage of an on-demand environment.

The following sections describe the deliverables that will be created in each phase.

Discovery Phase

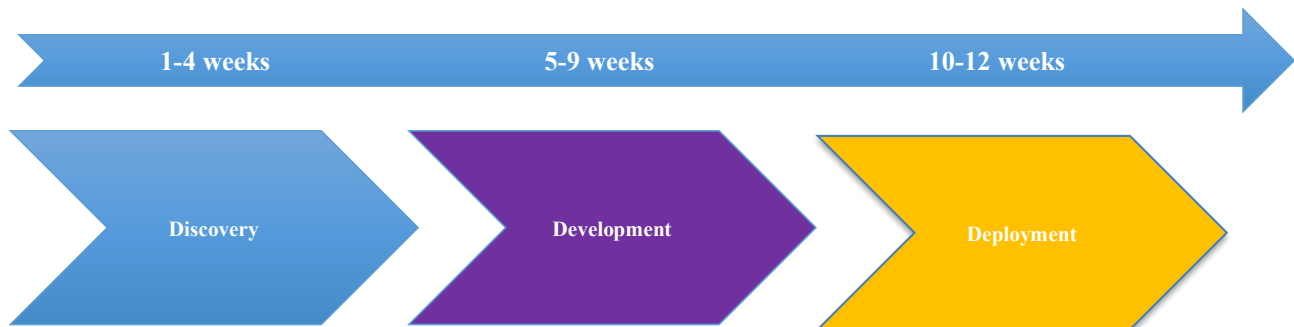
During the Discovery Phase Professional Services Consultant(s) will assist Customers in analyzing how the module(s) will be configured and implemented to meet the business requirements of the Customer based on the data provided.

Development Phase

The objectives of the Development Phase are to complete the configuration of the module(s) based on the discovery sessions and Discovery Workbooks completed in Phase One. User Acceptance Testing (UAT) will consist of one cycle of testing. The testing cycle consists of configuration and process validation as well as any necessary configuration changes and retesting of those changes. Testing scenarios are delivered to the Customer for execution. Upon successful testing and verification of the configuration, the Customer will sign off on the completed instance prior to deployment. Customers interested in additional test cycles may request this through their Professional Services Consultant(s); additional cycles will incur additional fees.

Deployment Phase

The Deployment phase finalizes the Module(s) with the features/functionality enabled and configured as described in the Project Details section. The Customer will transition to Customer Support at completion of implementation at which time Support will be the primary contact for the Customer. For a period of two weeks after the Production system has been provided, the Professional Services Consultant(s) will still be available to provide support to answer any questions, address issues, ensure a smooth transition over to Support and make sure the Customer is successful using the module(s).



SilkRoad Recruiting Baseline Configuration

- The Professional Services Consultant shall configure initial recruiting manager user
 - The Professional Services Consultant shall load users up to maximum licensed purchased
- The Professional Services Consultant shall load business units up to one hundred (100) on Customers behalf
 - Additional business units shall be configured by Customer
- The Professional Services Consultant shall load departments up to five hundred (500) on Customers behalf
 - Additional departments shall be configured by Customer
- The Professional Services Consultant shall load locations up to five hundred (500) on Customers behalf
 - Additional locations shall be configured by Customer
- The Professional Services Consultant shall configure job categories up to twenty-five (25) on Customers behalf
 - Additional job categories shall be configured by Customer
- The Professional Services Consultant shall configure job templates up to one hundred (100) on Customers behalf
 - Additional job templates shall be configured by Customer
- The Professional Services Consultant shall configure custom offer fields up to twenty (20)
 - Additional custom offer fields must be provided to and configured by SilkRoad
- The Professional Services Consultant shall configure offer letter templates up to ten (10) on Customers behalf
 - Additional offer letters shall be configured by Customer
- The Professional Services Consultant shall configure rejection letter templates up to ten (10) on Customers behalf
 - Additional rejection letter shall be configured by Customer
- The Professional Services Consultant shall configure hiring stages
 - Additional hiring stages must be configured by SilkRoad
- The Professional Services Consultant shall configure hiring workflows up to five (5)
 - Additional hiring workflows must be configured by SilkRoad
- The Professional Services Consultant shall configure hire custom fields up to the max ten (10)
- The Professional Services Consultant shall enable report access to standard delivered reports
- The Professional Services Consultant shall configure applicant sources up to the max one hundred (100)
- The Professional Services Consultant shall configure requisition custom fields up to the max twenty (20)
- The Professional Services Consultant shall load reviewers up to five hundred (500) on Customers behalf
 - Additional reviewers must be configured by SilkRoad
- The Professional Services Consultant shall configure fee agencies up to twenty (20)
 - Additional fee agencies shall be configured by Customer
- The Professional Services Consultant shall configure candidate/resume custom fields up to the max ten (10)
- The Professional Services Consultant shall configure candidate/contact custom fields up to the max ten (10)
- The Professional Services Consultant shall configure email templates up to ten (10)
 - Additional email templates shall be configured by the Customer

- The Professional Services Consultant shall configure job posting headers and footers up to five (5)
 - Additional job posting headers/footers must be provided to and configured by SilkRoad
- The Professional Services Consultant shall configure dispositions up to twenty-five (25)
 - Additional dispositions must be provided to and configured by SilkRoad
- The Professional Services Consultant shall configure interview completion status up to twenty-five (25)
 - Additional interview completion status must be provided to and configured by SilkRoad
- The Professional Services Consultant shall configure review completion status up to twenty-five (25)
 - Additional review completion status must be provided to and configured by SilkRoad
- The Professional Services Consultant shall setup one (1) external standard career site in English or one (1) language
 - Customer shall configure career site content
- The Professional Services Consultant shall setup one (1) internal standard career site in English or one (1) language
 - Customer shall configure career site content
- The Professional Services Consultant shall setup one (1) standard SilkRoad eApplication with no changes
 - eApplication includes the background check consent form
- JobTarget OneClick Basic job distribution service (if included in the agreement)
- The Professional Services Consultant shall configure the standard Recruiting (OpenHire)-to-Onboarding (RedCarpet) new hire connector (if Onboarding (RedCarpet) is included in this agreement or previously installed)
- The Professional Services Consultant shall provide support for user acceptance testing
 - One testing cycle consisting of configuration and process validation, remediation of testing results and confirmation of remediated items

Delivered Training

- Foundation Training, Public Webinar, up to five (5) seats included
- Portal Studio for Administrators, Public Webinar, up to five (5) seats included
- Launch Training, Private Webinar, up to ten (10) seats included. Training conducted in configured Customer instance

SilkRoad Onboarding Baseline Configuration

- The Professional Services Consultant shall configure the definition of up to one (1) event
 - Examples of event definitions include onboarding, offboarding, maternity leave and transfer
- The Professional Services Consultant shall configure event category values
 - A category is an attribute or qualifying criteria used to match an employee to tasks. Category value matching is used for both task generation and task assignment. Example categories include Location, Department, Job Level and Job Type
- The Professional Services Consultant shall assist the Customer in the design and configuration of one (1) workflow with no more than twenty-five (25) tasks with associated notifications
 - A workflow is made up tasks associated with a given event
 - Customer shall configure additional tasks and notifications associated with event
- The Professional Services Consultant shall configure teams and privileges
 - A Team is a group of users with common privileges and/or responsibilities
- The Professional Services Consultant shall configure employee user profile fields up to twenty (20)
- The Professional Services Consultant shall create initial set of employees
- The Professional Services Consultant shall develop up to ten (10) eForms (up to one hundred (100) fields; no advanced validation)
- The Professional Services Consultant shall provide the forms library (Appendix B)
- The Professional Services Consultant shall configure a single event portal
- The Professional Services Consultant shall configure portal roles up to ten (10)
 - Portal Roles are assigned to allow access to content in the Onboarding (RedCarpet) portals
- The Professional Services Consultant shall configure portal content based on a ten (10-page portal)
 - Customer shall configure portal content
- Included in base Onboarding (RedCarpet) purchase is the Electronic I-9 completion with electronic signatures and advanced validations
- The Professional Services Consultant shall configure the standard Recruiting (OpenHire)-to-Onboarding (RedCarpet) new hire connector (if Recruiting (OpenHire) is included in this agreement or previously installed)
- The Professional Services Consultant shall provide support for user acceptance testing
 - One testing cycle consisting of configuration and process validation, remediation of testing results and confirmation of remediated items

Delivered Training

- Introductory eLearning prior to implementation
- Go Live Training
- Office Hours

SilkRoad Performance Baseline Configuration

- The Professional Services Consultant shall upload initial set of employees
- The Professional Services Consultant shall configure employee fields up to twenty (20)
- The Professional Services Consultant shall configure journal categories up to twenty (20)
- Baseline Configuration Appraisal Module
 - The Professional Services Consultant shall configure Appraisal forms up to eight (8)
 - The Professional Services Consultant shall configure workflows up to eight (8)
 - The Professional Services Consultant shall create a rating scale to be used for grading performance in Appraisal Models
 - The Professional Services Consultant shall provide a walkthrough of one initial Appraisal model to ensure that the Customer understands the model building process
 - Customer shall make modifications to models or process Customer shall configure additional Appraisal forms using WingSpan's Form Builder Tool
 - Customer shall review all uploaded models, ratings and workflow steps
- Baseline Configuration Goal Module
 - The Professional Services Consultant shall configure Plan Rules
 - The Professional Services Consultant shall provide a walkthrough of the Goal module configuration areas (Matrix, Plans, etc.)
 - The Professional Services Consultant shall provide consultation on launching and maintaining Goals
 - Customer shall review goal setting process, email and narratives
- Baseline Configuration Assessment Module
 - The Professional Services Consultant shall configure Assessment forms up to eight (8)
 - The Professional Services Consultant shall configure Assessment groups up to eight (8)
 - The Professional Services Consultant shall create a rating scale to be used for grading performance in Assessment Models
 - The Professional Services Consultant shall provide a walkthrough of one initial Assessment model to ensure that the Customer understands the model building process
 - Customer shall create or load additional Assessment forms using WingSpan's Form Builder Tool
 - Customer shall review all uploaded models, ratings and assessment groups
- Baseline Configuration Development Module
 - The Professional Services Consultant shall provide a walkthrough of the Development Planning module and how activities and plans are used
 - The Professional Services Consultant shall load and configure Development activities
 - The Professional Services Consultant shall configure the standard Performance (WingSpan)-to-Learning (GreenLight) development connector (if Learning (GreenLight) is included in this agreement or previously installed)
- Baseline Configuration Succession Planning module
 - The Professional Services Consultant shall provide a walkthrough of the Succession Planning module
 - The Professional Services Consultant shall demonstrate how to configure succession planning data points, conduct searches, create pools
 - The Professional Services Consultant shall configure variables / 9-box reports up to five (5)

- The Professional Services Consultant shall provide support for user acceptance testing
 - One testing cycle consisting of configuration and process validation, remediation of testing results and confirmation of remediated items
- Customer shall document current processes
- Customer shall gather and consolidate HRIS data for system load if applicable
- Customer shall import a list of participants and relationships

Delivered Training

- Foundations Training, Public Webinar, up to five (5) seats included
- Launch Training, Private Webinar, up to ten (10) seats included. Training conducted in configured Customer instance

SilkRoad Learning Baseline Configuration

- The Professional Services Consultant shall configure a standard web template for the student portal
- The Professional Services Consultant shall configure a single standard administrator portal including the setup and initial import of student, instructor and administrator data of user accounts and records
- The Professional Services Consultant shall load initial users
- The Professional Services Consultant shall load organization structure
- The Professional Services Consultant shall load legacy training records (includes name of course and result)
 - SilkRoad provides Customer with user-facing tools for loading legacy training records
 - Customer shall convert their legacy training records to the Learning (GreenLight) proprietary CSV format to load
 - Customer shall import completed legacy training records using the standard Learning (GreenLight) import tool
- The Professional Services Consultant shall load objectives and assessments up to two (2) if applicable in initial scope
 - Additional objectives and assessments must be configured by Customer
- The Professional Services Consultant shall load exam questions up to twenty (20) if applicable in initial scope
 - Additional exam questions must be configured by Customer
- The Professional Services Consultant shall create content objects up to two (2) if applicable initial scope
 - Additional content objects must be configured by Customer
- The Professional Services Consultant shall train Customer on configuration of eCourses up to one (1) if applicable in initial scope
 - Additional eCourse must be configured by Customer
- The Professional Services Consultant shall configure sequencing rules if applicable in initial scope
 - Additional sequencing rules must be configured by Customer
- The Professional Services Consultant shall configure instructor led course up to one (1) if applicable in initial scope
 - Additional Instructor led courses must be configured by Customer
- The Professional Services Consultant shall import courses based upon purchase
- The Professional Services Consultant shall create training activities up to two (2) if applicable in initial scope
 - Additional training activities must be configured by Customer
- The Professional Services Consultant shall create exams up to two (2) if applicable in initial scope
 - Additional exams must be configured by Customer
- The Professional Services Consultant shall create assignments and surveys up to two (2) if applicable in initial scope
 - Additional assignments and surveys must be configured by Customer
- The Professional Services Consultant shall train Customer on how to load SCORM courses
- Customer shall be responsible for loading SCORM compliant courseware

- The Professional Services Consultant shall provide support for user acceptance testing
 - One testing cycle consisting of configuration and process validation, remediation of testing results and confirmation of remediated items
- Customer shall create additional user accounts
- Customer shall add system reports from the Learning (GreenLight) repository

Delivered Training

- Introductory eLearning prior to implementation
- Go Live Training
- Office Hours

Q4 2016 Offerings

Onboarding Express

Baseline Configuration

- Project Preparation, Kickoff Meeting, Requirement Gathering Meeting(s)
- Single Onboarding Event
- Single I-9 Re-Verification Event
- Single Onboarding Event Portal
- Tasks for New Hire and 3 Team Members
- Standard Employee User Profile Fields
- Import of core users and upload of company logo
- 3 Categories (work locations, employee types and job levels)
- USA and Canada eForm Library Package
- Recruiter Lobby
- Five (5) eForm (s) Included:
 - Consent to do Business Electronic
 - Direct Deposit
 - Policy Acknowledgement
 - Emergency Contact
 - Non-Compete
- Delivered Training
 - eLearning Introductory Session
 - Go Live Video
 - Knowledge Check

SilkRoad Agile Performance Introductory Bundle

Baseline Configuration

- Checkin-ins
- Reveiws
- Goals

Talent Activation Bundle

SilkRoad Recruiting (OpenHire®) Software Solution

Baseline Configuration

- Project Preparation, Kickoff Meeting, Requirement Gathering Meeting(s)
- One (1) Standard delivered eApplication Setup (includes background check consent form).
- External Career Site
- JobTarget OneClick Basic job distribution
- Foundation Training, Public Webinar, five (5) seats included
- Launch Training, Private Webinar, up to ten (10) seats included. Training conducted in configured client instance
- Delivered Portal Studio, Public Webinar, up to five (5) seats

SilkRoad Onboarding Express

Baseline Configuration

- Project Preparation, Kickoff Meeting, Requirement Gathering Meeting(s)
- Single Onboarding Event
- Single I-9 Re-Verification Event
- Single Onboarding Event Portal
- Tasks for New Hire and 3 Team Memebtrs
- Standard Employee User Profile Fields
- Import of core users and upload of company logo
- 3 Categories (work locations, employee types and job levels)
- USA and Canada eForm Library Package
- Recruiter Lobby
- Five (5) eForm (s) Included:
 - Consent to do Business Electronic
 - Direct Deposit
 - Policy Acknowledgement
 - Emergency Contact
 - Non-Compete
- Delivered Training
 - eLearning Introductory Session
 - Go Live Video
 - Knowledge Check

SilkRoad Agile Performance Introductory Bundle

Baseline Configuration

- Checkin-ins
- Reveiws
- Goals

Ask us about Additional Services Offered:

- **Professional Consulting Services**
 - Professional Services Consulting
 - SilkRoad Dedicated Administrator
 - Project Management Oversight
 - Onsite Discovery Sessions
 - Onsite Testing Support
- **SilkRoad Recruiting (OpenHire)**
 - Additional eApplication(s)
 - Standard
 - Custom
 - Additional Career Site(s)
 - Background Check Vendor Partners Integration
 - Assessment Vendor Partners Integration
 - Drug Screening Vendor Partners Integration
 - Work Opportunity Tax Credit (WOTC) Integration—Tax Break Partnership
 - Data Conversion Projects
 - Custom Portals
 - Custom Report(s)
 - Additional Training Options
 - Language Packs
- **SilkRoad Onboarding (RedCarpet)**
 - EVerify Integration
 - Additional Portals
 - Additional Events
 - Offer Letter Forms
 - Additional eForms
 - Standard
 - Custom (Advanced Validation)
 - Background Check Partner integration
 - Drug Screen Vendor Partner Integration
 - Survey Partners Vendor Integration
 - Outplacement Vendor Partner Integration
 - Additional Training Options
 - Language Packs
- **SilkRoad Performance (WingSpan)**
 - Compensation Partners
 - Compensation Administration through Iconixx Merit
 - Compensation Administration through Iconixx Incentive
 - Compensation Administration through HCR Software (Compensation XL)
 - Appraisal Module

- Additional Appraisal Forms
- Assessment Module
- Development Module
- Custom Report(s)
- One Time Goal Import
- Additional Training Options
- Language Packs
- **SilkRoad Learning (GreenLight)**
 - Additional Student Portals
 - Ecommerce
 - Custom Report(s)
 - Additional Training Options
 - Language Packs
- **Technical Services**
 - Integration Services
 - Customer Led Integration Project
 - Full Service Integration Project
 - Integration Partners
 - ADP WFN 6+
 - Authentication
 - LifeSuite Login
 - External Authentication
 - Testing Environments

SilkRoad Professional Services Team Roles

- **Resource Manager**
 - Responsible for Professional Services resource allocation
 - Confirms contract receipt with Customer, sends welcome information
 - Reviews contracted project details and confirms implementation start dates
 - Launches Customer Onboarding event and grants Community access
- **Project Manager**
 - Primary Contact and overall engagement lead throughout all implementation projects
 - Responsible for coordinating the timing and execution of SilkRoad deliverables
 - Responsible for coordinating SilkRoad resources throughout the project
 - Serves as point of contact for escalations, open items and risk mitigation
- **Professional Services Consultant(s)**
 - Consults on required deliverables and follows proven implementation process
 - Helps you translate your roadmap into your specific processes
 - Manages regularly scheduled status calls and prepares project for deployment
 - Provides best practice solutions to customer requirements based on product functionality
- **Technical Consultant**
 - Coordinates and executes integration deliverables and authentication requirements
 - Completes technical configuration of applications(s) such as data management and custom development (eForms, portals)
- **Training Consultant**
 - Conducts training through Foundation and Launch sessions, as well as provide Custom Training offerings
 - Helps ensure your product rollout is successful
- **SilkRoad Dedicated Administrator (SDA)**
 - Extension of your organization, helping to fill resource gaps
 - A dedicated systems administrator who serves as a primary point of contact for a customer's support needs
 - Support back end transactions and administrative functions within the product module
 - Assists with user adoption and release planning

Customer Team Roles

- **Project Sponsor**
 - Identifies and secures all required project team members for the project
 - Key contact for executive decisions, contract changes and escalations
 - Aids the implementation team in overcoming internal roadblocks and scope changes
 - Approves major deliverables and provides high-level direction
 - Champion the project within the organization
- **Project Lead**
 - Primary contact and responsible for execution of customer deliverables, configuration and project oversight
 - Confirm solid understanding of corporate objectives and expectations; if necessary, reset objectives and expectations
 - Approve the implementation schedule and project plan
 - Continually monitor scope, time frame, budget and risk
- **Subject Matter Experts (SME)**
 - Department/Functional experts responsible for assisting Customer Project Lead in process, data, and system configuration decisions
 - Responsible for executing tasks and producing deliverables as outlined by the project plan
- **IT Resource**
 - Technical lead responsible for execution of customer deliverables related to integrations and authentication
 - Identification / design / development of required system interfaces
 - System test planning and assistance to users in the execution of the system testing process
- **Trainer**
 - Responsible for training end users on usage of the system
 - Develop training materials and work with the project team to define the training approach for end users
- **Communications**
 - Responsible for change management and communicating with employees/end users throughout the organization
 - Focuses on changes to business processes, roles and responsibilities within the new product, organizational structures and the impacts of these changes