Workforce Ready Customer Implementation Guide

A Collaborative Process from the Start

As you begin your Workforce Ready implementation, you want to maximize your investment by getting up and running as quickly and efficiently as possible, with minimal disruption to your organization. A well-managed implementation — completed on time and within budget — gets you off to a strong start and lays the foundation for early success. But while process and software functionality are important elements of a successful implementation, our implementation goal is more broadly focused on the ability to reach full, effective user adoption.

Achieving this goal requires close collaboration between Kronos and your organization. It starts with a plan designed to ensure that the solution we deliver meets all your specified requirements. We'll work with you to build an implementation plan that:

- Reflects your organization size, industry, and specific business needs
- Outlines your contributions to project success, including executive sponsorship, project team responsibilities, and resource commitments
- Allows you to manage resource and timeline expectations within your organization
- Incorporates quality checkpoints to ensure your ongoing satisfaction and minimize the risk of missteps or schedule delays

Using our proven Momentum™ implementation methodology, Kronos guides you through all the critical planning, execution, and quality measurement involved in system deployment. With the right plan in place, the combined Kronos/customer project team can share common expectations and goals from the start. And both organizations can be held accountable for their required contributions to keep the project on track for a successful and timely completion.

Remote delivery supports faster implementation at a lower cost by leveraging processes and efficiencies—along with a focused team—to reduce project hours. The net result is accelerated time to value. The average implementation timeline is 8-12 weeks for the Workforce Ready TimeKeeping module and approximately 12-16 weeks for the full Workforce Ready suite. During this time, we develop a close working relationship with your project team so that together we can make timely and informed decisions for your organization, resulting in an on-time implementation success.

Our Commitment to Customer Satisfaction

Kronos' number one priority is to satisfy the needs of our customers. That's why throughout the project, we will regularly be assessing your satisfaction level with the implementation process. Are your expectations being met? Are your goals being achieved? Do you feel that all phases of the process are progressing smoothly?

The project plan for your implementation will include specific goals and milestones. These milestones are defined throughout the project, enabling the project manager to review the scope and quality of the project prior to progressing to the next phase of the project. At each milestone, we'll formally ask for your feedback to assess progress.
Momentum Overview

The Momentum implementation methodology has been created, developed and refined over years of successfully implementing Kronos workforce management solutions. This methodology provides a phased, structured approach to implementation that minimizes risk and helps to keep you on schedule, and on target for meeting project requirements. Our seasoned project managers and consultants guide your team through our proven process, providing best-practice advice and assistance in each of the following phases:

- **Plan** – Prepare for implementation, establish project success criteria, and plan the project scope, including guidelines, schedule, risk mitigation, and communications.
- **Assess** – Collaborate with all your diverse organizations to understand their needs. And then work with your core project team to design a consolidated solution that maximizes application performance and overall business benefits.
- **Solution Build** – Build your solution according to your documented business requirements, a process that includes installing and configuring the application, managing data migration, designing and implementing connectivity, and performing unit testing.
- **Test and Certify** – Support your system and integration testing, resolve all critical open issues, initiate end-user training, and plan for system deployment.
- **Deploy and Support** – Assist your transition from a project-oriented, pre-production environment to a successful and live production operation backed by Kronos Support Services.

Specific tasks and milestones associated with each of these phases are outlined later in this document.

Standard Project Assumptions

The following standard assumptions are made as we approach all Workforce Ready implementations:

- The customer business environment will not impact the implementation (e.g., no acquisitions anticipated).
- The customer is responsible for developing their workforce management policies and for documenting and disseminating business procedures to support the Kronos solution.
- The customer’s project team will adhere to the project timeline and responsibilities.
- The customer agrees to participate in and deliver all required Discovery documentation within the agreed-upon time frame in order to meet the agreed go-live date. *Any delays in participation or documentation delivery within this timeframe will negatively impact the project timeline.*
- The customer will develop test plans for the project, and will complete, execute, validate and signoff on the solution as per the project schedule.
- The customer will confirm and sign off on the design documents.
- The customer will define and create any user procedures necessary to ensure a successful rollout. It is understood the qualified staff will be assigned to the project by both organizations. Unqualified staff assigned to the project may cause project delays.
- There is a commitment from the customer that they are able to provide resources and support as required. This includes teamwork between internal and external resources as well as a customer project manager to ensure communication and planning within the customer team.
- Project team members will commit to meet regularly, to assign and complete assignments, review work plans and test results, and will have the authority to make decisions and recommendations. Meeting schedules will be developed as part of the project planning phase.
- Commitment from the customer’s upper management is crucial to the success of the project. Kronos assumes the customer will assign a high-level executive as a project sponsor who will remain
engaged during the full lifecycle of the implementation and take an active part in reviews and sign offs.

The Project Team

Project organization and staffing are critical success factors in achieving the project vision, managing the project, and communicating information to affected stakeholders during the implementation. Organization and staffing must be clearly defined and delineate accountability, responsibility, and lines of reporting. The structure must balance and facilitate project objectives, and user needs, and the strategic vision, while delivering a quality on-time project.

Project staffing and organization must be established and agreed to early in the project. In fact, Kronos’ experience has shown that the project team needs to be aware of their level of involvement in the implementation of the Kronos solution as the project is being planned. This includes not only the project manager, but also representatives for payroll, human resources, finance, IT, operations and scheduling. In some organizations, the resources available in one organization role may be able to cover more than one project role. The number of individuals assigned to each team and the length of each assignment will depend on several factors, including the experience of the individuals, the duration of the project, the size/breadth of the end-user community, and the scope of the individual business area.

Kronos implementation teams are comprised of project managers, who guide your project to successful completion, and consultants who provide extensive knowledge of Kronos products, technology and best practices. Individuals on the customer implementation team, such as the HR manager or payroll manager, are responsible for executing project tasks on time and within the quality guidelines. These individuals should have a good understanding of your processes, the underlying technical environment/tools, and the business/functional environment and requirements.

The chart below summarizes the resources required for a successful project team:

<table>
<thead>
<tr>
<th>Title</th>
<th>Role/Expertise</th>
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<tbody>
<tr>
<td>Executive sponsor</td>
<td>• Assists in forming the project team and acts as a mentor to the project team; functions as the champion, removing obstacles and generating support among all stakeholders to maintain the timeline and success of the project.</td>
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<tr>
<td></td>
<td>• Supports the standardization of policies and ensures all sites are taken into consideration.</td>
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<td></td>
<td>• Commits time to be engaged prior to starting the project and remains committed during the full lifecycle of the implementation, including phase reviews and milestone sign offs.</td>
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<tr>
<td>Project manager</td>
<td>• Makes sure business procedures are documented and users are trained.</td>
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<td></td>
<td>• Assists in the development of a detailed project schedule.</td>
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<td></td>
<td>• Communicates issues to the customer’s management and ensures resolution.</td>
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<td></td>
<td>• Ensures that the appropriate project team members and key decision-makers are identified and available to fulfill their project responsibilities; identifies and secures access to additional customer and user staff as needed to support specific areas of expertise not represented by the project team.</td>
</tr>
<tr>
<td></td>
<td>• Complete all Discovery documents (with input from subject matter experts as appropriate)</td>
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<td></td>
<td>• Makes adequate facilities and resources available for the implementation.</td>
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<td></td>
<td>• Chairs regular project meetings to discuss project status and informs customer staff of any urgent issues if and when they occur.</td>
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<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities</th>
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<tr>
<td>Payroll subject matter expert</td>
<td>• Contributes knowledge of your time, attendance, union contracts, payroll practices, payroll policies and reporting needs.</td>
</tr>
<tr>
<td>HR subject matter expert</td>
<td>• Contributes knowledge of your organizational structure, salary grades, job positions, benefits, union contracts, employee handbook, and human resource actual practices, documented policies and reporting needs.</td>
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</tbody>
</table>
| Technical lead/team (including an experienced system administrator and an interface specialist knowledgeable in the data flow requirements of systems to be interfaced) | • The technical team performs Kronos administration and coordinates technical deliverables such as the development of conversions and interfaces.  
• Monitors and reports on project technical status; resolves and/or escalates technical project issues.  
• Defines and sets up applications relating to system administration.  
• Participates in system and unit testing.  
• Assists with extracting historical paycheck information from legacy systems for uploaded into Workforce Ready |
| Training lead                             | • Responsible for defining/creating user procedures to successfully rollout the system to end users. |
| KRONOS - Practice manager                 | • Responsible for the customer’s overall satisfaction with the Kronos project team, ensuring that quality resources -- as well as quality processes and standards -- are applied to each task. |
| KRONOS – Project manager                  | • Serves as the primary lead for the implementation project; acts as the primary point of contact for scheduling the delivery of Kronos resources and training to the customer team.  
• Addresses customer requests related to project templates, and acts as a support resource to the implementation team.  
• Ensures the implementation meets workforce management business needs; creates a timeline for project deliverables.  
• Identifies, assigns, and manages team member responsibilities and monitors task completion.  
• Fine-tunes team assignments and timeline as needed. |
| KRONOS – Application consultant(s)        | • Guides and facilitates discussions resulting in an in-depth analysis of the customer requirements; collects and interprets the business requirements for the project, and translates these into design documents.  
• Configures the Workforce Ready solution to comply with the necessary specifications.  
• Provides basic interface configuration and support to customers, answering questions on functional usage of the product and integrations. |
Momentum Implementation Methodology

PLAN PHASE
The Plan phase includes the transition from sales to initiate the implementation project, the introduction of the project team, and assessment preparation. Milestones to be accomplished within this period include the following:

- Introduce the members of both the Kronos and the customer project teams
- Validate the project scope and project success criteria, including the desired customer business outcomes and benefits to be realized
- Establish project management procedures based upon recommended practices to ensure successful Kronos implementation
- Establish tentative project timeline
- Gather all of the information needed to configure the Workforce Ready solution; review and complete Discovery documents (worksheets and formal documentation of system configuration requirements) for each Workforce Ready module

*NOTE: As part of My Learning training, Kronos offers Implementation Essentials courses (one for each product), which are critical to ensuring customer preparedness for the Assess phase. These courses provide an understanding of the information you need to collect in order to complete the Discovery documents.

ASSESS PHASE
During the Assess phase, the project team analyzes the data collected through the Discovery documents, including interface specifications, and finalizes the project plan. Milestones within this phase include the following:

- Fully understand the customer’s business goals and address how the solution will assist in achieving these based on the Discovery document review
- Ensure the customer has a full understanding of their solution, the training required to implement it, and the processes and information flow prior to solution build
- Complete timeline and project plan for the remainder of the implementation
- Provide interface specifications and employee data
- Develop change management and training plans so that education can be appropriately scheduled around the project phase approach, activities, and milestones. (See sidebar)

SOLUTION BUILD PHASE
During this phase, the focus is on software (and hardware) configuration and unit testing. Specific goals include:

- Provide an optimal working application, and interfaces that meet the approved solution design

Education Jumpstarts Success

According to Aberdeen research, 76% of organizations with a formal training program in place are satisfied with their technology, compared to 50% of organizations with no formal training in place — a clear indication that employees are using the system and operating more efficiently. In other words, when employees are trained to use workforce management technology, organizations are more satisfied with their technology investments.

Organizations should provide project team training as well as end-user training. Project team training builds the expertise in-house to address any future concerns while end-user training is the key to accelerating end-user adoption. Aberdeen stresses that the true value of a training program is not in the basic training during deployment but rather in an ongoing program that will help employees with varying skill sets feel comfortable learning over an extended period.

Get your project off to a strong start by empowering your project team and end users with training and information they need to unlock the value of your Kronos system — from day one. Individual, role-based learning prepares your project team for implementation so you get up and running quickly. And comprehensive end-user training increases user adoption and drives early success.

- **Project team training:** We can train your project team to facilitate a fast, efficient implementation and a smooth transition to live system operation. Project team members can learn with confidence and complete your project quickly and accurately.
- **End-user training:** Our embedded My Learning program provides 24x7 access to training materials, such as how-to simulations and job aids, so that end users are fully prepared to use the system.
Managing Change

Frontline employees are the key to successful Workforce Ready adoption. By focusing on employee awareness and engagement, you can increase the adoption of Workforce Ready and take a significant step toward making your implementation successful and helping your organization achieve its desired business and ROI goals.

According to Aberdeen Research, in any change management strategy, organizations should consider “who” needs to support the change and “what” type of communication needs to occur to explain the change. Organizations with formal training are more likely to address each of these questions. But change management activities should also focus on the WHY of automating workforce management.

Too often with a new technology implementation, employees don’t understand why a new solution is being rolled out. They may not appreciate why the change is necessary and will likely experience natural resistance when faced with changes to their daily tasks and routines. Without proper training, employees won’t be able to get the most from the new technology, further increasing their resistance.

Addressing these issues upfront with a plan that includes employee communication and training will help to ensure that employees will soon be using the Kronos system effectively, efficiently and productively.

While communicating about organizational change, keep the following considerations in mind as you develop your internal communications plan: All communications should be targeted to various levels of the organization. Don’t make the mistake of focusing on people in problem areas or on those who are believed to be resistant to change. Instead try to reach the majority of people and emphasize the many benefits that the Kronos system offers.

Customer-Specific Responsibilities

Customers are responsible for a wide variety of tasks and deliverables throughout the Momentum implementation process, including the following:

- **Strategy and Planning:** Serve as a single point of accountability for strategic planning; coordinate resources and activities; manage schedule/scope/risk

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- Provide sufficient end-user knowledge of the operation and management of the Kronos solution to the testing team
- Ensure the customer is prepared to move into the Test and Certify phase

At this time, project resources should take training to ensure sufficient knowledge of the operation of the solution, allowing for testing that will accurately reflect end-user processes.

**TEST & CERTIFY PHASE**

Customers are responsible for unit, integration and operational testing during the Test and Certify phase:

- Verify solution is configured as per the approved solution design, with support and configuration changes provided by the Kronos team
- Verify solution integration
- Verify solution performance
- Train end-users and managers

A key milestone achieved at the close of this phase is solution acceptance. After technical review of the outcomes of testing, the project team obtains agreement sign off of the solution to be deployed.

**DEPLOY & SUPPORT PHASE**

This phase marks the formal production milestone and includes the following activities:

- Complete end-user education and validate deployment of solutions in and end-user environment
- Transition the solution into a production environment
- Close project and enable transition to post implementation support

At this point, the customer has signed off on the solution, trained end-users and is prepared to transition to post implementation support.

Kronos is committed to unlocking your workforce management investment through superior service — beginning with a well-managed implementation that gets you off to a strong start for early success. When your implementation is complete, we’ll assist you in the transition from a project-oriented, pre-production environment to a successful and live production operation reinforced by Kronos Support Services.

Review the Kronos Change Management workbook for more information and guidance that can help you maximize your Kronos investment and get up and running quickly and efficiently, with minimal disruption to your organization.
- **Discovery**: Collect and analyze a complex amount of configuration data
- **Communication**: Investigate change management needs; develop a change management strategy and tactical plan; draft an ongoing communication plan to help employees embrace change
- **Training**: Coordinate logistics; oversee scheduling, participation, and post-training evaluation and assessment; target specific audiences and system modules; ensure broad awareness of My Learning online interactive job aids and task simulations for ongoing education

The sample weekly checklist below can serve as a reference guide to help the customer project team remain organized throughout the Momentum process. This first task list assumes an implementation of Workforce Time Keeping only, followed by a sample task list for a full-suite Workforce Ready implementation. Requirements and deliverables will vary based on your individual implementation.

### WORKFORCE TIME KEEPING ONLY

<table>
<thead>
<tr>
<th>Week</th>
<th>Task</th>
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</table>
| 1    | - Assemble internal project team  
      | - Review any documentation from the sales cycle to ensure a complete understanding of the project goals, objectives and critical business issues  
      | - Attend kick-off meeting |
| 2-4  | - The Core team takes relevant training to ensure the team has sufficient knowledge of the Kronos application needed to make informed decisions regarding their solution design  
      | - Complete Discovery document – configuration cannot begin until all Discovery documents are complete  
      | - Complete employee import templates – employee imports cannot be completed until templates are submitted  
      | - Provide interface specifications and employee data  
      | - Develop training and change management/communications plan  
      | - Determine testing strategy (ensure completion of the testing criteria, selection of the testing team and test groups and associated documentation)  
      | - Prepare for time clock installation (it’s recommended that customers initiate this activity as soon as possible to ensure that configuration and testing activities are not delayed)  
      | - **DISCOVERY DOCUMENT SIGN OFF** following a review with the Kronos project team |
| 4-7  | - Project resources/administrator/manager training  
      | - Complete unit, integration and operational testing; advise the Kronos project team of any issues and/or sign off on all testing activities  
      | - Ensure clocks are online and collecting data (including clock training and biometric enrollment, if appropriate) |
| 7-9  | - Complete training  
      | - Execute change management / communications plan which includes, at a minimum, informing employees about the upcoming system change and differences that should be expected when clocking in/out)  
      | - **SOLUTION ACCEPTANCE MILESTONE** |
| 10-12| - Process a live payroll  
      | - Meet with the Customer Success Manager to transition to Kronos Support  
      | - Become a member of the Workforce Ready online community  
      | - **PRODUCTION MILESTONE** |
**FULL WORKFORCE READY SUITE**

<table>
<thead>
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<th>Task</th>
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</table>
| 1 | • Assemble internal project team  
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• Attend kick-off meeting |
| 2-4 | • The Core team takes relevant training to ensure the team has sufficient knowledge of the Kronos application needed to make informed decisions regarding their solution design  
• Complete Discovery document(s) – configuration cannot begin until all Discovery documents are complete  
• Provide interface specifications and employee data  
• Develop training and change management/communications plan  
• Determine testing strategy (ensure completion of the testing criteria, selection of the testing team and test groups and associated documentation)  
• Prepare for time clock installation (it’s recommended that customers initiate this activity as soon as possible to ensure that configuration and testing activities are not delayed)  
• **DISCOVERY DOCUMENT SIGN OFF** following a review with the Kronos project team |
| 5-8 | • Ensure that Kronos team has sufficient access to internal resources  
• Project resources/administrator/manager training  
• Complete employee and HR import templates – employee imports cannot be completed until templates are submitted  
• Ensure clocks are online and collecting data (including clock training and biometric enrollment, if appropriate) |
| 9 | • End-user training for Payroll and HR modules |
| 10-12 | • Complete historical import templates by employee, by quarter |
| 12-14 | • Complete unit, integration and operational testing; advise the Kronos project team of any issues and/or sign off on all testing activities  
• Import and balance historical payroll data  
• Execute change management / communications plan which includes, at a minimum, informing employees about the upcoming system change and differences that should be expected when clocking in/out; raise awareness of potentially different payroll appearance (if appropriate); develop employee communications regarding changes to the open enrollment process (if appropriate)  
• **SOLUTION ACCEPTANCE MILESTONE** |
| 15 | • Process a parallel payroll |
| 16 | • Process a live payroll  
• Meet with the Customer Success Manager to transition to Kronos Support  
• Become a member of the Workforce Ready online community  
• **PRODUCTION MILESTONE** |