

Interfolio Implementation Methodology Guide

SUMMARY VERSION

Content

4	Implementation Team and Definitions
7	Phase 1: Plan
8	Phase 2: Inform
9	Phase 3: Train
9	Phase 4: Deploy
10	Closeout and Handoff
10	Implementation Best Practices
12	Change Management

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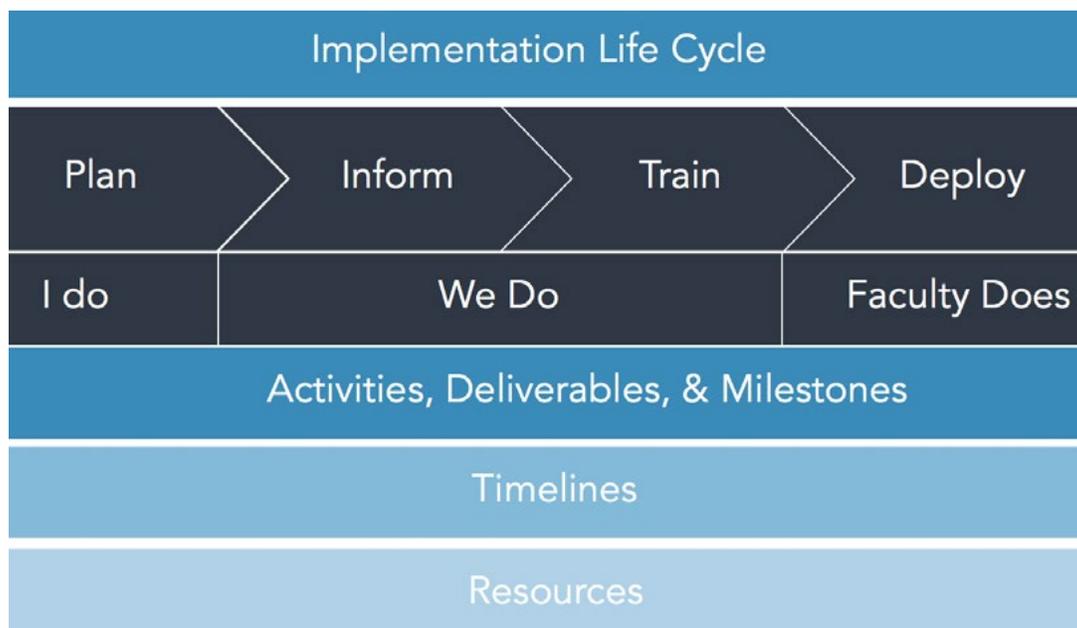
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Overview

This summary version of the Implementation Methodology Guide provides a summary of our implementation process and how we support your institution's successful implementation of Interfolio. To promote your success, we have used our skills and experience to build a roadmap, complete with tools and resources, that leads to successful deployment of the products to your faculty and staff. All Interfolio implementations follow a simple and repeatable methodology that leads to continued client success: Plan > Inform > Train > Deploy.

Implementation Team

Implementation begins by identifying the members of your organization who will serve as part of the implementation team and will work closely with Interfolio throughout the implementation. The implementation team will meet regularly for the duration of the project and is required to attend the virtual and onsite workshops with the Project Manager. Not all individuals on the team will be involved in the day to day implementation process, but as the project moves through major milestones the larger group will reconvene to celebrate accomplishments and look forward to what's upcoming.



INTERFOLIO IMPLEMENTATION TEAM

- ▶ Project Manager: Main point of contact for your organization; participates in all meetings, trainings, and testing of Interfolio product(s); brings in additional Interfolio resources as needed
- ▶ Consultant: Interfolio’s expert on specific products and processes throughout the project
- ▶ Trainer: Works with the Interfolio Project Manager to plan and conduct trainings throughout the project lifecycle
- ▶ Support: Various additional team members brought into implementation activities

- ▶ Executive Sponsor: Conducts periodic check-ins with your organization's Executive Sponsor; serves as point of contact for your organization to escalate above the Project Manager
- ▶ Account Manager: Ongoing support throughout the relationship with Interfolio

INTERFOLIO IMPLEMENTATION TEAM

Depending on your Interfolio module, you may need fewer identified team members for a successful implementation. Additionally, it is common for one individual to play more than one role within the project team.

- ▶ Project Manager: Main point of contact for Interfolio; participates in all meetings, trainings, and testing of Interfolio products
- ▶ Software Administrator: Responsible for configuring the Interfolio products with the help of the Interfolio Project Manager
- ▶ Data Manager (IT): Represents the IT department. Assists with SSO, data transfers/integrations and adding forms to the institution's website
- ▶ Subject Matter Expert: Represents the different types of departments and/or group of users who will work in the Interfolio products
- ▶ Faculty Advisors: Represents faculty users who will work in the Interfolio products
- ▶ Executive Sponsor: Serves as point of contact for Interfolio should we need to escalate a project issue above the client team
- ▶ Steering Committee: Led by an engaged Executive Sponsor, this group has representation from the colleges to allow faculty voices to be represented and heard at the highest level. They oversee the implementation and the ongoing maintenance of the Interfolio modules.
- ▶ Trainer: Institutional trainer to assist in refresher, onboarding, and new trainings

Once implementation is complete, the Interfolio Implementation Team will introduce your institution to our Interfolio Scholar Support Team and Account Manager who will provide continued engagement and support.

Phased Implementation

Upon project kickoff, our Project Manager will collaborate with your team to create a custom implementation plan with timelines and associated resources. Depending on your objectives, we can either implement all three modules simultaneously or take a modular approach to deploying a single product at a time.

Successful implementations have several key characteristics. They use a well-defined process with key milestones, set within a manageable timeline and scope. There is a core team of super users, who hold defined roles and have decision-making authority. Ideally, the implementation team is led by an empowered project manager and an engaged executive sponsor who champions the project and the benefits Interfolio will bring to your faculty. The final component to a successful implementation regards the data: the data coming into the system must be clean, correct, and compliant, and your institution should be able and willing to integrate and leverage data during the implementation process.

The phased approach to implementation should help you achieve all of these hallmarks of successful implementations. Our standard implementation process for the Interfolio Faculty Information System follows the below phases, regardless of the module and timing.

Phase 1: Plan

During the Plan phase, you will be introduced to your Interfolio Project Manager as the project transitions from the sales process to implementation. Your Project Manager will lead the kickoff with your team, reviewing the key objectives of the project along with timelines, milestones, and implementation expectations. Interfolio will share our project tools, including a client dashboard, project plan, online client community, specific module resources, and sample files. Additionally, your identified project team will receive access to Interfolio University, our online training portal, to get access to courses on each of our products to help you get a baseline understanding of their functionality. A meeting cadence will be established to ensure that the team is meeting regularly throughout the project to discuss progress and timeline, and proactively address issues. Interfolio will prepare the project team and environment for configuration.

During this phase, Interfolio and your institution will help gather foundational information for your implementation. This will include gathering data on the current state at your institution, inclusive of processes, roles, data, and systems to help set the implementation team for successful implementation.

We've seen that collaboration between the project team and faculty leads to the most successful implementations. During the Plan phase, the project manager on your institutional implementation team should be preparing the organization for the change. Completing a thorough analysis of the variation in policy and process throughout your institution will allow your message to speak directly to the concerns faculty and department administrators may be having. Clear, regular communication with your faculty throughout the implementation, highlighting the benefits of the product, changes to processes and policies, recent milestones of the project, upcoming trainings, and ways to find more information are key to a successful implementation.

Phase 2: Inform

Once planning is complete, the Inform phase starts. This phase includes much of the setup of the system by your implementation team. The Inform phase begins with your Interfolio Project Manager leading an in-depth review of the product(s) followed by a series of administration configuration workshops with your implementation team. Prior to these workshops, the project team will need to complete the necessary courses within Interfolio University, our online training resource. This will allow for the workshops to be more focused on your institution's specific processes. Workshops will then be followed by working sessions in which your implementation project team will complete the necessary configuration. Each product will have different configuration requirements to be completed prior to moving on to the training phase. A key part of the Inform phase for any product is using the time to initiate a clear communication strategy so faculty and administrators throughout the institution are aware and engaged about what is upcoming.

For all product implementations, the first tasks in the Inform phase are setting up single-sign on (SSO) and creating the organizational structure/unit hierarchy in the system (this can be completed with an API if your system of record allows it). For any Interfolio product, your implementation team will complete all user setup and configuration. Throughout this phase of the project, Interfolio will work with your implementation team to ensure they are comfortable with all the configuration options before performing the work independently (with Interfolio support, of course).

Prior to moving on to training, the Inform phase of the project will be closed out with a check-in with the steering committee. The agenda will include reviewing key objectives of the project, as well as the timeline and upcoming milestones. We will also review the plan for the Train and Deploy phases of implementation, as well as the communication around these phases of work. Interfolio will provide a configuration overview to be approved by the steering committee. Your university is also responsible for building an Interfolio policy manual for your school's expectations for faculty and staff around the accuracy and maintenance of data. Interfolio can provide examples of policies other institutions have developed.

Phase 3: Train

Interfolio uses a “Train the Trainer” approach, training project managers, software administrators, college administrators, and faculty on system use and best practice. The subject of these trainings varies depending on product, but all set up your institution for successful long-term ownership of the product. Trainings can occur onsite or virtually and will be scheduled by the Interfolio Project Manager and your institution’s project manager.

Phase 4: Deploy

The final phase of the Interfolio implementation process is Deploy—when staff at your institution start using Interfolio. Once training is complete, products can be deployed to end users—a small group of initial users or across the institution—based on the institution’s timeline. The Deploy phase for any module will conclude with an implementation debrief with Interfolio and the institution team. During this conclusion your Interfolio Account Manager will become active in your account and continue its management moving forward. In addition to your Account Manager, all of your users (unit Administrators, Committee Managers and Members, Candidates, and Applicants) will have access to the Interfolio Scholar Services support team to help answer questions.

Closeout Process and Handoff

Once your institution is live and stable in the system, the Interfolio Project Manager will complete an implementation debrief with your institution's team to close out the project. The implementation debrief will consist of a review of the overall implementation, the successes achieved, and areas for improvement. In addition to your Project Manager, your Account Manager and a representative from our Scholar Services team will be on the call to help your account transition from implementation to active client. Your Account Manager will review their role and objectives for a positive ongoing relationship between your institution and Interfolio. The Scholar Services representative will go over Interfolio's support model and review the resources your institution has available in addition to the Scholar Services team, such as the Interfolio Client Community and Interfolio Help Center.

If you are implementing multiple products, your Project Manager may close out one product while continuing to work with you on the other implementations.

Interfolio Best Practices

With over twenty years of experience in higher education, Interfolio is uniquely positioned to offer best practices in the areas of implementation and change management.

IMPLEMENTATION

The following are lessons that our clients and our service team have learned that can help your institution be successful as you deploy Interfolio on your campus.

- 1. Select a steering committee.** Select a strong steering committee, led by an engaged Executive Sponsor, to serve as the primary stakeholder for the project and ongoing relationship with Interfolio. This committee allows for an ongoing agile approach to the products and project—having the ability to pivot and evolve as the project, faculty usage, and product functionality evolves over time. It is important that this group has representation from the colleges to allow faculty voices to be represented and heard at the highest level. During implementation, the steering committee is in charge of overseeing and supporting the implementation team, monitoring project progress, and reporting project status out to executive leaders and the wider institutional community. After implementation, it should remain the steering committee's responsibility to oversee the ongoing use and maintenance of Interfolio modules.

2. **Solicit faculty engagement.** A successful implementation is driven by active faculty engagement, from the purchase of the product through implementation, training, and deployment. It's important to make faculty feel like they have a voice in the process. Having regular meetings with stakeholders and ensuring faculty are represented is an important component of implementation success.
3. **Consolidate Interfolio information.** Consolidate all of the information regarding your Interfolio implementation in a central place, including product definitions, timelines, and likely impact to campus users. This kind of resource is also a great place to put links to other assets, like support guidelines, help articles and tips and tricks to make product use easier.
4. **Create a clear support structure.** Once your institution is using Interfolio, it is essential to have a clear support structure in place for your campus users. This way faculty know who to contact with their questions, whether your institution's internal support desk, an internal ticket system, or calling Interfolio Scholar Services. It's also important to be clear about when Interfolio can help and when they are not the right resource, for instance if the question is regarding the policies of your institution.
5. **Facilitate communication.** Clear, consistent communication to faculty throughout implementation is important. Highlight the benefits to the institution, as well as process changes that will benefit them directly in order to improve buy-in. Creative resources like videos from executive sponsors help to drive engagement and excitement about the products as they are about to be deployed.
6. **Be proactive about faculty support.** Rather than waiting for faculty to have issues, provide support proactively with workshops and office hours for faculty to ask questions or even complete their work with a little extra help.
7. **Embed Interfolio in any new hire onboarding.** Make an introduction to Interfolio part of onboarding for new staff. Give them access to their Interfolio account right away so they can review guidelines and start collecting materials for upcoming institutional reviews.
8. **Join the Interfolio Client Community.** Get involved with the client community to network with other clients from all over your country and the world. You can gain knowledge regarding best practices, find answers to your questions, stay up to date on upcoming webinars and product enhancements, and have opportunities to share meaningful insights with peers.
9. **Revisit Interfolio University.** As you move through and beyond your implementation of our software, the courses you have access to in Interfolio University can become a great resource for you to remember how to complete a certain task within the system.

Change Management

Interfolio's goal when it comes to change management is to drive successful outcomes and set up your organization for long term success. Interfolio wants to include a thoughtful approach to change management at every phase of the client relationship to increase the likelihood of success.

Plan: It is important to manage change during the start of any engagement with a technology provider because it sets the tone moving through the other phases. During this period, it is important to socialize why your institution chose Interfolio and how Interfolio will help your organization achieve its goals. It is also important to identify the organization's change management champion or leader. This will often be either the Project Manager or Executive Sponsor of implementation—someone who knows what the big picture is and can communicate with the relevant parties. Finally, it is important to engage faculty representatives from the outset, as they will be the end-users of these products.

Inform: During the Inform phase, it is important to ensure that the communication plan takes into account the needs of faculty and administrative users who might be wary about changing processes. Not only should the communication plan be clear, consistent, and align with the organizational goals, it should also emphasize why the project is taking place and what the long term strategy and goals are.

Train: During the Train phase, your campus users are expecting to learn new ideas and processes, so change can be discussed during most activities. Many of the institutional stakeholders will be involved in these processes, and the change management goals you have set can be easily reiterated.

Deploy: During the final phase of implementation, it is important to continue to communicate with stakeholders via the change management champion or leader. Users will be experiencing the implemented product on their own for the first time, so it is important to reiterate why the products are being used and what the long-term strategy and goals are during these initial growing pains. It is also important to ensure that information about the project and products is readily available to end-users.