

Blackbaud Award Management™

Implementation Overview

Award Management Implementation

The following document provides an overview of the Award Management implementation process. Since Award Management is a highly configurable solution, the implementation can vary among clients based on their needs and processes.

Our goal is to provide a fully configured solution that is intuitive and easy to navigate for all system users (administrators, applicants, and reviewers). During the implementation process, we will make *best practice* suggestions to improve system usability and work to ensure that we are meeting your goals and objectives.

Stewardship Management Implementation

First, we'll create an implementation team. That team will likely consist of:

- **Blackbaud Onboarding Project Manager (OPM)**
 - Serves as your initial contact with Blackbaud
 - Requests initial deliverables required before implementation
 - Facilitates handoff to Business Analyst to begin implementation
- **Blackbaud Business Analyst (BA)**
 - Serves as your primary contact with Blackbaud after implementation kick-off call
 - Serves as your consultant and project manager for the next several weeks (i.e., until you have successfully completed all major milestones for the Award Management project)
- **Campus Scholarship Coordinator:**
 - Should be the person most familiar with the award process at your organization
 - Serves as our primary contact throughout the implementation
 - Should be prepared to provide information about your current stewardship processes (opportunity worksheet, applicant data file, etc.)
- **Campus IT Contact:**
 - Required for organizations wanting to utilize LDAP or Single sign-on (SSO) or import applicant information
 - Will not need to participate in every implementation meeting
 - Coordinates creation of LDAP/SSO Test Account and data import file

Implementation Milestones (Tasks)

The milestones for your Stewardship Management implementation are divided into four stages. These stages may vary slightly depending on your process and overall needs:



Summary of Main Implementation Steps

- **Onboarding/Initial project deliverables:**
 - Onboarding Project Manager (OPM) sends you a Welcome Email that contains information on prerequisite items needed in order to begin your project
 - OPM confirms that all prerequisite project items are complete and helps answer any questions regarding those items
- **Implementation Kick-Off Call:**
 - Begins after you provide deliverables to OPM
 - OPM hands off your project to your Business Analyst (BA)
 - BA explains implementation process and reviews an interactive project plan, which will guide your team through the remainder of your implementation
- **Site Build:**
 - BA guides you through necessary setup tasks, potentially including:
 - Verifying IT components begun in Onboarding phase
 - Configuring General and conditional applications
 - Configuring scholarship opportunities with details, dates, funding information, qualifications, and supplemental questions
 - Customizing site settings such as applicant instructions, email templates, etc.
 - You work with your BA to become your own system expert, including:
 - Registering for and taking recommended training courses
 - Reading recommended topics from product documentation
 - Actively exploring your system and coming prepared with questions

- **Configuration/Launch:**
 - You and your BA review a final pre-launch checklist
 - You and your BA discuss any needed changes
 - You begin advertising your system to your applicant base
 - BA remains available as a resource for 1-2 weeks for questions or concerns
- **Transition to Customer Support:**
 - BA provides overview of Blackbaud Support resources, including:
 - Product documentation
 - Support chat
 - Case Central (bug reporting)
 - Training
 - Knowledgebase
 - User community (including feature request process)

Implementation Milestones (Timeline)

The following time estimates are general guidelines and may vary considerably depending on a variety of factors:

Milestone	Duration	Responsibility
Welcome email from onboarding	1 business day	Blackbaud and Client
List of scholarship names and descriptions (opportunity worksheet)	10-15 business days	Client
Provide initial student data file to Blackbaud	10-15 business	Client
Provide and configure system authentication (Shibboleth, SAML, LDAP)	10-15 business days	Client
Deliver existing applicant form(s)	10-15 business days	Client
Implementation kick-off (meet your BA)	1 business day	Blackbaud and Client
General Application build	15-20 business days	Client
Opportunities configuration	20-30 business days	Client
Site-wide settings (email, instructions, etc.)	15-20 business days	Blackbaud and Client
Final changes and system launch	10-15 business days	Blackbaud and Client
Transition to Customer Support (implementation concludes)	1 business day	Blackbaud and Client