Training

Project Kickoff Preparation

A complete data integration and replication solution

Kickoff Agenda Template

Every integration project should begin with a structured kickoff call. This sets expectations, builds client confidence, and lays the foundation for a successful implementation.

1. **Introductions:** Team roles & responsibilities
2. **Project Overview:** Integration objectives & outcomes
3. **Scope Review :** Inclusions/exclusions in integration?
4. **Timeline & Milestones:** Delivery phases & completion dates
5. **Roles & Responsibilities:** Who is responsible for what on both teams?
6. **Communication Plan:** Meeting cadence and escalation paths
7. **Next Steps:** Immediate deliverables and questions from the client

Design and Analysis Session

- The kickoff call is a key opportunity to collect technical and business requirements.
- These questions should be asked during or immediately after the call to ensure accurate and timely information.
- Use the DBSync template titled “Introduction – Client Sample” as your guide.
- Early alignment on requirements helps avoid delays and supports a smoother implementation process.

Setting Expectations: Timeline, Scope, Communication

Project Timeline Overview

- During the kickoff call, provide a high-level project schedule to align expectations
- Set realistic delivery dates for key milestones
- Configuration
- Testing
- Go-live
- Use the "Project Implementation Plan" tab as a reference to guide accurate time estimates
- Clear timelines help ensure smooth coordination and successful project execution.

Understanding “Scope” from the Project Plan

Scope defines what will and won’t be delivered in the project. During the kickoff or early planning stages, it’s essential to align with the client on expectations.

Non-supported objects:

- Reports or dashboards
- Custom development or automation not listed in the initial discovery

How to Use the Project Plan:

- Refer to the “Scope: In Scope” and “Scope: Out of Scope” sections.
- Review any assumptions or constraints.
- Use this to manage expectations and avoid scope creep later.

Communication Plan

Define a communication plan:

- Establish a clear communication structure during the kickoff to ensure alignment and responsiveness throughout the project
- Schedule weekly stand-ups or sync calls for regular updates
- Define the Slack/Email escalation path for urgent issues
- Identify the main point of contact for questions and follow-ups
- A strong communication plan helps maintain momentum and keeps all stakeholders informed.

Object Mapping: CRM to Accounting or Accounting to CRM

How to Use the Mapping Templates:

- Open the “CRM to Accounting” and “Accounting to CRM” tabs
- Review pre-filled examples
- Use client responses to complete a custom mapping

Key Points to Map:

- Object name and type (standard or custom)
- Field-level mappings (source field → destination field)
- Data types (string, number, date, boolean, etc.)
- Transformation rules (e.g., format conversion, lookups)

