

**Case, Matter, & Practice Management System  
Software Web Site**

*Sample CMS Implementation  
and Training Plan*

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<b>Task Description</b>	<b>Start Date</b>	<b>Responsibility</b>
<b>Initial Needs Assessment Phase</b>		
Needs Assessment	Week 1	Firm & Developer
Establish Implementation Plan, Training Environment	Week 1	Firm & Developer
User Documentation Requirements	Week 2	Firm & Developer
<b>Software Customization Phase</b>		
Determine CMS Customization Needs	Week 3	Firm & Developer
Begin CMS Customization	Week 4	Developer
Deliver, Test CMS Customization	Week 6	Firm & Developer
CMS Customization Adjustments	Week 8	Developer
Deliver, Test CMS Customization	Week 10	Firm & Developer
<b>Data Conversion &amp; Testing Phase (if needed)</b>		
Deliver Data Layout to Developer	Week 2	Firm
Data Mapping Report Conversions	Week 3	Developer
Initial Data Conversion Test	Week 4	Developer
Data Conversion Review	Week 6	Firm
Data Conversion Adjustments	Week 8	Developer
Data Conversion 2nd Review	Week 9	Firm
Final Data Conversion Adjustments and Review	Week 10	Firm & Developer
<b>Roll Out Phase</b>		
Install Software	Week 4	Firm & Developer
Implementation Assistance	Week 6	Firm & Developer
Deliver Data for Final Data Conversion (if necessary)	Week 10	Firm
Final Data Conversion (if necessary)	Week 12	Developer

<b>Task Description</b>	<b>Start Date</b>	<b>Responsibility</b>
<b>Training Phase</b>		
CMS Administrator Training	Week 3	Developer
End User Training	Week 12	Developer
One on One Training & Floor Support	Week 14	Developer
Final Acceptance by Firm	Week 22	Firm