

TELEPRESENZ® PROCESS FLOW – FOR CUSTOM SOLUTIONS

Process Checklist	Partner	Telepresenz®	Customer
Stage 1: Partner Certification			
Signed partner agreement	✓	✓	
Completed 1 week of training	✓	✓	
Completed 40 question assessment to be certified as a partner	✓	✓	
Renewed partner certification and valid for one full year. Ready to promote.	✓	✓	
Stage 2: Discovery			
Custom Requirements forwarded to TP team for high level feasibility confirmation	✓		
Partner Alignment: schedule internal discussion, questions from TP tech team to clarify requirements	✓	✓	
Response from customer on technical queries forwarded to TP tech team	✓		
TP/Partner/Customer Business Process Review call	✓	✓	✓
Map the internal approval flows, business goal, and stakeholders for buying decision	✓	✓	
TP/Partner/Customer Technical Review call – Backend System details, Data formats, Flows, Devices, Network and Security Configuration: determine firewalls, connectivity, etc.	✓	✓	✓
Stage 3: Planning & Proposal			
TP provide draft proposal & cost to Partner		✓	
Partner Alignment: schedule internal proposal and cost review prior to client submission	✓	✓	
Submit the proposal to the client	✓		
TP/Partner/Customer Proposal review call	✓	✓	✓

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Partner Alignment: If the client does not approve to go to the next stage, review all prior steps for gaps with TP	✓	✓	
Stage 3: Approved to work			
Project Management Office: assign the point of contact, delegate responsibilities, initiate handoffs for work scope and requirements	✓	✓	✓
Stage 4: Finalize the agreement			
Final Agreement – Sign off	✓		✓
Stage 5: Start Project			
Partner Alignment: Regular Status Calls	✓	✓	
Keep the client updated on the progress and address any issues or concerns that may arise during the project.	✓		
Stage 6: UAT & Delivery			
User Acceptance Test – Planning and Scheduling Call	✓	✓	✓
Conduct UAT	✓	✓	✓
Stage 6: Deployment			
Production deployment planning and scheduling call - setting up servers, configuring the solution, and providing documentation to the customer.	✓	✓	✓
Final Acceptance of Delivery	✓		✓
Stage 7: Support			
Ongoing support providing training and answering questions.	✓		
Level 2 Support – Fix bugs and technical clarifications		✓	