



Esker Professional Services

Maximizing the return on your investment
in document process automation



From the planning stages until you go live with your Esker DeliveryWare solution, maximize your return on investment with affordable, expert analysis and superior technical assistance from Esker Professional Services. The Esker consulting team works with you to understand your business communication goals, and demonstrates how to best achieve (or exceed) them with document process automation. Esker Professional Services also offers in-depth product training, assistance with upgrades, migrations, integration with other solutions, and custom development.

Give your IT team a break — let Esker do the work.



Helping you achieve business success

Esker Professional Services offers the technical expertise and practical experience to smoothly move your project from concept to implementation to knowledge transfer — so you can quickly realize the business benefits of document process automation with Esker DeliveryWare.

You can count on Esker Professional Services to:

- **Recognize and recommend** the best solution for your document process problem
- **Speed implementation** of your Esker DeliveryWare solution — minimizing risk and maximizing ROI
- **Reduce costs** associated with implementation, support and maintenance
- **Ensure** that your business communication objectives are met as stated in the agreed-upon project plan

Esker Solution Methodology

Over the years, Esker Professional Services has developed a reliable 4-step process for successful Esker DeliveryWare implementation projects. The Esker Solution Methodology encompasses needs assessment, requirements and process analysis, implementation and production. Esker Professional Services will work with you to verify successful completion of each step, ensuring your project delivers the desired results.

1. Needs Assessment

The first step in a successful Esker DeliveryWare implementation is a detailed assessment of your current document-based business process, desired automation results, and technical infrastructure. The result is a mutually agreed-upon implementation plan with clear strategic objectives and success metrics. Documentation of requirements resulting from this step includes a detailed process map, an estimate of ROI and an overview of services to be performed as part of the project.

2. Requirements and Process Analysis

Requirements and Process Analysis produces a work agenda, Joint Project Planning workbook, master schedule, and quality assurance and training plan. Specific content includes:

- **A description of the current process:** time measurement of the steps, screen shots and sample documents
- **Process analysis:** existing Key Performance Indicators (KPI) and main weaknesses in the current process
- **Solution:** business requirements, functional requirements, projected KPI, description of the process with Esker DeliveryWare and document field mapping

If necessary, this step may also include an in-depth analysis of current process issues and cost as well as a precise ROI calculation.

Any professional journal will tell you that failure of most projects is due to poor planning and lack of strategy. The fact that Esker has a well-designed and well-executed solution methodology fits with us. They like to plan for and mitigate risk. They made themselves available and were professional. They did an excellent job of managing the project.

Wendy Marker ■ Project Manager/Technical Lead — SAP Basis and Technology Lead ■ Pentair, Inc.

3. Implementation

During this phase, Esker Professional Services installs and configures your Esker DeliveryWare solution based on detailed specifications of the technical design and architecture. Implementation includes:

- **Design** specifications and prototype of document fields and main processes involved
- **Development** of business rules for document workflow
- **Quality assurance testing** and **training** in preparation for go-live

4. Production

When installation and configuration is complete, and testing has ensured all business objectives are met, Esker Professional Services will deliver a project acceptance sign-off document and facilitate a smooth transition to the Esker technical support team. Esker support will be available to you should you need assistance with your Esker solution.

Training

Because the true value of Esker solutions is not in the technology itself but in the knowledge of how to use it, Esker Professional Services offers scheduled and customizable training courses designed to build up your in-house expertise and continue driving your project's value over time.

Hotline

Another way Esker Professional Services delivers value is by providing a direct communication link to expedite fulfillment of common requests for assistance. The Esker Professional Services Hotline offers assistance at an hourly rate for help with requests such as installation, DeliveryWare Rule creation, and upgrade guidance.

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