

Custom PROJECTS WITH A VENDOR

WHAT TO EXPECT

Why This Document?

If you're reading this, you probably have found a vendor's solution you want to hook up to CBX or It's Me 247 to augment the services and solutions you offer your members. Perhaps you don't want to "hook it up," so to speak, but you need the data contained in CBX sent somewhere, likely on a recurring schedule so you can leverage it in a vendor's solution to get the job done. Sounds great! Give me one of those, right?

Whoa! Not so fast! Building these integrations can indeed be done but it's not always for the faint of heart, and it's not usually a quick simple process. That's why we created this document to assist you along the way. It lays out the process, what we expect from you and what you can expect from us, and shares our experience on common pitfalls to look out for so you can have a successful project that meets your expectations and comes in on time without surprises. **Let's get started!**



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EXPECTATIONS

- You should expect that this will not be a hands-off process. It will require your ongoing involvement. You are bringing your vendor to the table; you are the liaison between them and CU*Answers.
- You should expect it will take time! Plan ahead. Usually the queue has about a 120-day lead time to get a programmer assigned and that's only after we are past all the steps leading up to the actual project entering the queue. Those R&D steps to get to the point of a project being submitted can take months all on their own, depending upon the nature and scope of the project and the vendor's cooperation.
- You should expect that it might be expensive! You will likely have costs from the vendor and from CU*Answers for completing the work. Before you sign with a vendor, always research if there are existing solutions that you can leverage that meet the business need.
- You should expect that we may not be able to accommodate every feature, vendor or project. Sometimes things just don't make technical or business sense when we consider the whole of the cooperative, our current agenda, or our technologies in use, even though it may be what you want and you are willing to pay for it.
- You should expect we'll work with you and your chosen vendor every step of the way to explain the process and keep you apprised of status.
- You should expect we may need to make business decisions, like not signing an NDA, not doing something technically that is requested by your vendor but that we feel is risky or incompatible with our structure, etc. We need to think big picture in our decisions.

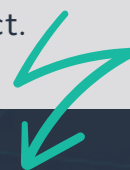
THE PROCESS

How to Get Started / Before You Engage Us

- Gather your business use case, any specifications or requirements, your timeline, your vendor's contact information.
- Do your due diligence on your vendor.

CONTACT US

Then, contact us via the store and let us know you're interested in a project.



<https://store.cuanswers.com/product/i-want-a-custom-services-project/>

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GETTING TO A PROJECT

Next is a discovery meeting between you and CU*Answers to understand your request. We won't be quite ready for your vendor just yet. It is very important to provide as many details as possible. We need to understand your business use case, any specs you have, timing, contacts, you name it! The more thoroughly we understand your request, what technical considerations it will entail and your business expectations, the more quickly your project can move through the channels.

- We will make sure you're aware of any existing integrations and functionality that we've already built to ensure you're not spending money to build something that you could perhaps get cheaper and quicker.
- Assuming a project is still in order, we'll take what we've learned in the discovery meeting and complete a Special Request/Authorization form.
- Next we may, depending upon the project, gather the appropriate folks at CU*Answers, and connect with your vendor to understand their solution from them, and what they believe is needed from us to make their solution a reality alongside CBX.

It's at this point we should have enough information to do an R&D bid. This is a bid that covers the costs for our efforts to research your project in more depth. The bid will come to you in the form of our Special Request/Authorization form. That form includes a section on R&D bid.

- Once you sign off on the R&D bid, then we go to work to understand the project in enough detail to quote a price. Based on what we learn we'll create the statement of work, specifications and establish the scope of the work for your project and ultimately the project bid for the actual development work.
- We'll provide you with the project bid that includes a credit for your R&D fees should you move forward. If you don't sign the project bid and move forward based on costs or timing, we understand. You would, however, forfeit your R&D fees.
- Assuming you sign off on the project bid, we have an official project! It's at this point we can set an expectation for when we will assign your project to a programmer – typically 120 days.

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THE PROJECT

After the project has been assigned to a programmer, they will begin work on programming your project and working with your vendor. We would typically be able to set an expectation for delivery for testing at this point.

There may be recurring project management meetings set up while this work is occurring to facilitate the work between the technical teams. You likely will be required to attend.

- Once programming and our internal QC/validation is complete, we would turn the project over to you and your vendor for testing.
- If testing goes well, we will coordinate a go-live date and we will move the project into production.
- You will receive the final bill for the project.

AFTER IMPLEMENTATION

If something goes wrong with the original coding, we will work to repair it. However, any additional enhancements or tweaks to the original work – whether you want to add features or the vendor changes somethings – will need to go through the same process as any other project, including getting a quote for the work and waiting your turn in the queue.



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THINGS TO LOOK OUT FOR

- Beware of vendors who **oversimplify, over promise and paint a utopia** for the sake of a sale. They may tell you they've already "built this with CU*Answers" or "we're underway" or "many CUs are already using it." While that may be the case, we have seen some vendors vehemently state that an integration exists or is underway when that simply is not the case. Do your due diligence and verify with us. Talk to your peers and get references.
- In a similar vein, even if we have already done a project with your vendor, be careful to **understand exactly what that project includes, and what it doesn't**. It may not include the specific things you are buying, as most vendors sell many different things, each of which can require different work on our end.
- **Beware of scope creep**. The temptation will be to ask for "just one more thing while you're at it," but those late scope changes can seriously derail a project timeline. You can expect that we may push those types of requests back through a business discussion and may require the work to be handled via a separate, later project bid.
- Most vendors believe that we should set up an environment for them to test against during the project and make it available to them, which we can do. What they also believe is that that environment will never go away and they can return to it at any point in the future. That's not something we can do. **Development environments exist for short periods during the project**. Also, we cannot create "sandboxes" for them in our actual production environment.
- Make sure you **review legal documents and agreements carefully** as you normally would as a part of any engagement with a vendor. Be ready for some haggling on Non-Disclosure Agreements especially, as those can go back and forth while your project hangs in the balance.