**Project Horizon
Weekly Status Report**

June 23rd, 2023

Execution Program Milestones

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Phase 1 Major Milestones

Phase 1 Program Management Milestones		Date Complete		Timeline								
				Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	
Phase 1 Development												
1	Vander Feature Development Sprints	5/9-ongoing	●				★		Bug-fixes will take place throughout end-to-end and leading up to go-live		
2	Reporting Development Sprints	5/9-ongoing	●				★				
Phase 1 Biz Testing												
1	Rollout Formal Biz Testing Framework	2/23	●	★							
2	Business Testing	5/17-ongoing	●				★				
Phase 1 End-To-End Testing												
1	End-to-End Test Plan & Process Defined	3/30	●		★						
2	End-to-End Test Cases & Scripts Build	5/12	●			★					
3	End-to-End Testing Complete	6/7	●				★				
Phase 1 Go-live												
1	Go / No-Go Decision – Training & Go-Live	6/2 & 6/28	●●				★	★			
2	Go-Live Complete	7/17	●						★		
Change Management Milestones												
1	Execute Project Horizon Internal & External Communications	Ongoing	●								
2	Training Curriculum & Material Development Plan Finalized	3/15 & 3/31	●		★ ★						
3	Associate Training Materials Complete (SOPs, How-To Articles, Live Sessions) – Phase 1	6/30*	●					★		
4	Agent & Dealer Training Materials Complete	6/6	●				★			
5	Associate and A&D Training Delivery Complete (Phase 1)	7/13	●						★	
6	Conduct Change Readiness Surveys (Pre and Post Go Live Phase 1)	7/24	●						★	
Program Governance												
1	Ongoing Program Governance	Ongoing	●								
2	Build Operational Readiness Plans & Track	3/30-ongoing	●●		★						
3	Transition Planning	8/11	●						★	

*Date pushed from the original 6/16 after aligning with BUs impacted by blockers and delays.

We are here

Project Horizon Status Update 6/23/2023

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OVERALL PROJECT STATUS : ◆

Phase 1 Major Milestones		
Phase 1 Program Management Milestones	**Date Complete**	
Phase 1 Development		
1 Vander Feature Development Sprints	5/9-ongoing	🟡
2 Reporting Development Sprints	5/9-ongoing	🟡
Phase 1 Biz Testing		
1 Rollout Formal Biz Testing Framework	2/23	🔵
2 Business Testing	5/17-ongoing	🟡
Phase 1 End-To-End Testing		
1 End-to-End Test Plan & Process Defined	3/30	🔵
2 End-to-End Test Cases & Scripts Build	5/12	🔵
3 End-to-End Testing Complete	6/7	🟡
Phase 1 Go-live		
1 Go / No-Go Decision – Training & Go-Live	6/2 & 6/28	🔵⚫
2 Go-Live Complete	7/17	⚫
Change Management Milestones		
1 Execute Project Horizon Internal & External Communications	Ongoing	🟢
2 Training Curriculum & Material Development Plan Finalized	3/15 & 3/31	🔵
3 Associate Training Materials Complete (SOPs, How-To Articles, Live Sessions) – Phase 1	6/30*	🟡
4 Agent & Dealer Training Materials Complete	6/6	🔵
5 Associate and A&D Training Delivery Complete (Phase 1)	7/13	🟢
6 Conduct Change Readiness Surveys (Pre and Post Go Live Phase 1)	7/24	⚫
Program Governance		
1 Ongoing Program Governance	Ongoing	🟢
2 Build Operational Readiness Plans & Track	3/30-ongoing	🔵🟢
3 Transition Planning	8/11	🟢

*Date pushed from the original 6/16 after aligning with BUs impacted by blockers and delays.

SCOPE 🟢	TIMELINE 🟡	ISSUES/RISKS 🟡	RESOURCES 🟢

SUMMARY: End-to-End testing efforts on final areas (primarily accounting) continue; some defects are still being identified and resolved, so retesting will extend to the week of 6/26. Business testers should continue to address new tickets in their testing backlog as rapidly as possible. Development Sprint 9 started on 6/21, focused on remediating remaining R1P1 critical and high items, and R1P2 scope. Some Phase 1 training material creation is delayed, but a plan is in place to complete by 6/30.

RECENT ACCOMPLISHMENTS

- Continued re-testing for E2E as new defect fixes are made available in UAT
- Continued R1P2 Planning and began Test Case Creation
- Nearing completion of R1 P2 sprint planning, forecasting and setup
- Completed Cycle 3 of Associate training materials development and identified outstanding materials to complete in later development cycles
- Hosted mid-June Change Network meeting on 6/22 and shared champion action items
- Developed questions for the upcoming pre-go live change readiness survey
- Agent & Dealer Training completed as of 6/23
- Go-Live and Hypercare schedule and process confirmed, and will be socialized in coming weeks

PATH TO GREEN

- Accounting is unblocked by or before 6/16 to allow testing of blocked test cases, and newly Created and Remaining Critical Defects to be Resolved and Retested by 6/27
- Other remaining bug-fixes and re-testing completed before 6/27 (Online Contracting, Dealer Portal, eStore, Rates, Claims, Warranty Forever)
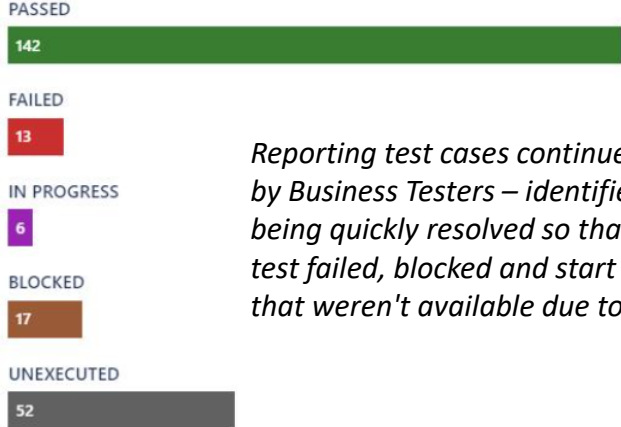
UPCOMING ACTIVITIES

- Complete Final Report Validation following Refresh
- Finalize (2-3) remaining Product tests to closeout R1P1 E2E testing
- Update R1P2 E2E Strategy and Finalize R1P2 E2E Plan
- Closely monitor outstanding phase 1 training material completion
- Continue to support phase 1 training delivery plans for BUs and teams preparing for Go Live changes
- Continue to develop How-to Articles to supplement Associate Training for select topics
- Start preparing for Pre-Go Live change readiness survey

Test Case Status (June 22nd)

Vander Feature Test Cases

PASSED
434

FAILED
2

IN PROGRESS
5

BLOCKED
28

UNEXECUTED
15

Reporting Test Cases

PASSED
142

FAILED
13

IN PROGRESS
6

BLOCKED
17

UNEXECUTED
52

Reporting test cases continue to be completed by Business Testers – identified defects are being quickly resolved so that testers can re-test failed, blocked and start any unexecuted that weren't available due to blockers.

STATUS 🟡 At-Risk

Target for E2E testing completion was 6/22. Accounting re-testing is taking place as defects are resolved 6/23 - 6/26. Additionally resolving issues with product setup (e.g. incorrect PRX or field selected) and resulting rating issues, to be resolved ASAP

- As blockers continue to be cleared over the next week, testers should be prepared to re-test when notified
- Results are point in time from 6/22 1:45 PM EST

High confidence	At Risk

Status of features with End-to-End testing blockers still in development:

Feature	Status
Online Contracting (eContracting)	Awaiting updates to Product Setup in Vander (verifying fields, updating form views, etc.)
eStore	Final signoff will be coordinated by Afia including Intacct Import
Accounting Exports	(3) Additional defect with exports captured on 6/20; retesting as defects are resolved, currently awaiting new code promotion to UAT
Dealer Portal	Awaiting updates to Product Setup in Vander (verifying fields, updating form views, etc.)
Warranty Forever	Ongoing follow-up on Email Validation

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Reporting Test Case Validation Details, majority in progress. Target to complete validation by 6/27
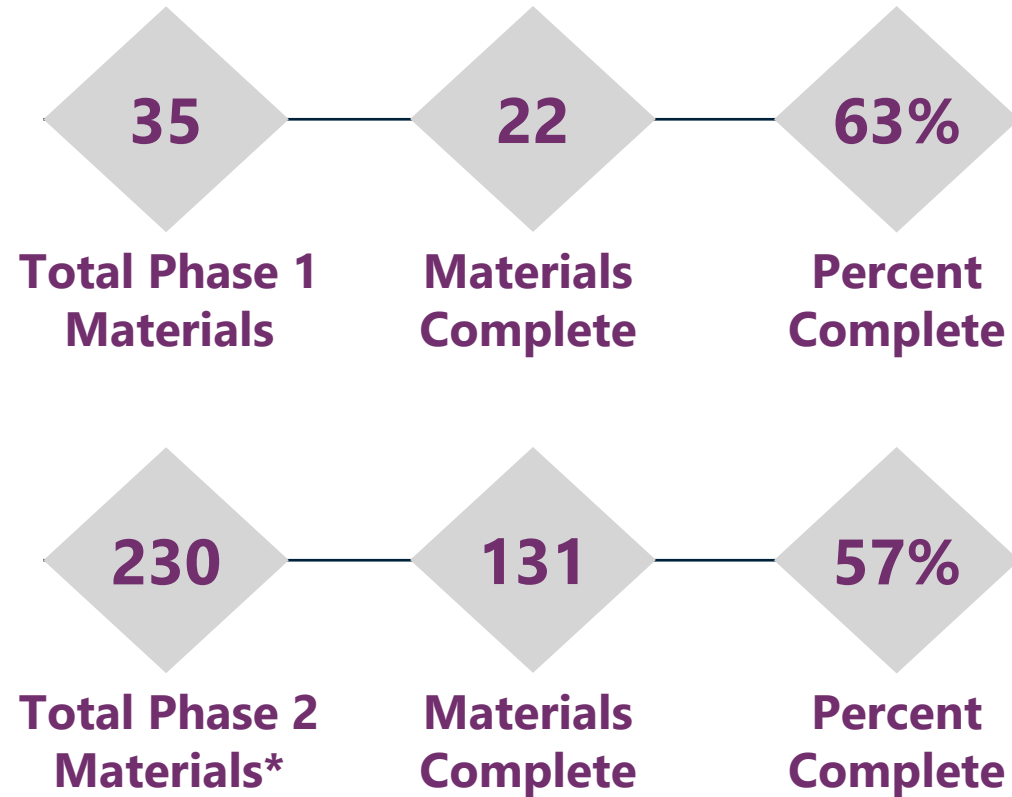
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Business Unit	Total Test Cases	% Complete	Status
Mechanical Claims	2*	0% (2 Blocked)	Waiting on Defect
Sales	31	58%	In Progress
Reinsurance	42	86%	In Progress
Accounting	57	38%	In Progress
Non-Mechanical Claims	55*	94%	In Progress
Risk Management	7	14% (5 Blocked)	Available to Retest
Contract Admin	43	100%	Complete
Legal	1	100%	Complete

*Note – Mislabeled test cases on import to Tricentis. Multiple reports shifted from Mechanical Claims to Non-Mechanical

Report Validation Closeout -Targeting Final close out by 6/27
- On Monday, please review and begin testing any remaining Reporting Tickets
- When comparing to Production Data Remember:
  - System will be up-to-date as of end-of-day 6/23
  - Weekend sales, updates, changes, won't be included in UAT

- All Validation **MUST** be done in **UAT**

Associate Training Development Update

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CONTENT DEVELOPMENT KEY STATS

35
Total Phase 1 Materials

22
Materials Complete

63%
Percent Complete

230
Total Phase 2 Materials*

131
Materials Complete

57%
Percent Complete

*Materials count reflect multi-topic courses, and includes 25 P1 items in need of a P2 update/check

Outstanding Content Development Updates

PHASE 1 OUTSTANDING MATERIALS

- 4 Business Units have Phase 1 training materials delayed due to blockers. Aiming to finalize by June 30th:
  - Accounting: 1 item
  - Client Relations: 4 items
  - Shipping: 1 item

- Additional "in progress" or "submitted for QA materials". Aiming to finalize by June 30th:
  - General Horizon: 3 items
  - Mechanical Claims: 2 items
  - Client Relations: 2 items

- Next steps: BU check-ins with trainers scheduled for June 26th & 27th.

PHASE 2 MATERIALS

CYCLE 4 OVERVIEW

- Extends current content development timeframe through July 14th
- For BUs **not** delivering Phase 1 Training:
  - Contract Admin
  - Reinsurance

CYCLE 5 OVERVIEW

- Runs from Monday, August 21st to Friday, September 22nd
  - Avoids overlap with P2 E2E Testing (July 31-Aug 18)
- Provides a break for BUs delivering Phase 1 training but who still have Phase 2 materials to be completed:
  - Accounting
  - Client Relations
  - Contract Admin (2 items)
  - Product Development
  - Mechanical Claims
  - Shipping

Action Items for Business Unit Owners

The Horizon Training Sharepoint site will be launched to all associates <mark>on Friday, June 30th</mark>

All Phase 1 training materials need to be uploaded to the site by then.

1

Provide final sign-off of all completed training materials <mark>by Tuesday, June 27th</mark>

Review and sign off all SOPs and live session materials as your teams complete them
- **To approve a document, ensure content includes:** updated process flows, screenshots taken from UAT environment to reflect future-system user interface, consistent formatting, correct spelling and grammar, etc.
- Don't forget to check the "BUO Sign-off" boxes in the SOP Tracker and Training Development Tracker to indicate item completion

2

Ensure all training documentation is uploaded to Horizon's Sharepoint site <mark>by Wednesday, June 28th</mark>

We'll be leveraging the Horizon Sharepoint site as the centralized repository for all training documentation.
- Ensure all the **final editable versions** of your training materials are uploaded to your BU's Associate Training folder, and all the **final non-editable versions** are uploaded to the Horizon Training section.
- If you have any concerns with your training documentation being available to all associates, please let us know **asap** so we can work with IT to set up the right level of permissions.
- **Please reach out to Kristen if your team needs support on these efforts!**

IT Sprint Velocity & Remaining Work by Workstream & Phase

Combined Velocity		Sprint 7 5/10-5/30	Sprint 8 5/31-6/20	Sprint 9 6/21-7/11	Sprint 10 7/12-8/1	Sprint 11 8/2-8/22	Sprint 12 8/23-9/13
Software	Target	114	172	175	175	175	175
	Actual	173	242	4			
Reporting	Target	N/A	75	75	75	75	75
	Acutal	50	119	8			

Remaining Work by Phase		Release Backlog	Business Analysis	In Dev	QA	Remaining Dev	Business Testing	Total Complete
R1P1	Software*	0	20	55	23	98	111	3607
	Reporting*	0	0	10	5	15	93	1074
R1P2	Software	73	71	147	24	315	67	136
	Reporting	2	25	42	0	69	103	255

* Critical and High Points for R1P1

- **IT Development Highlights**
  - **Sprint 8 (Closed)**
    - Addressed significant E2E bugs and Phase 1 scope to prepare for the July Go-Live. The team aligns with West Monroe and the broader organization on the Go-Live planning, weekend, and Hypercare support. We continue to see team cohesion and have leveraged prioritization to increase team velocity.
  - **Sprint 9 (Active)**
    - As we draw closer to the Go-Live date, the IT team is zeroing in on the Critical and High work. As shown in the table above, we have a few remaining issues (21 cards in Software and 5 in Reporting), representing 113 points in various states of completion. (As of 6/22) All remaining critical and high cards are in Sprint 9 and being worked.

Approved Horizon Change Control by Sprint and Phase

	Approved Software Change Control												
Sprint	**New Scope**			**Production Changes**			**Rework-Bugs-Defects**			**Total Added**			
	P1	**P2**	**Target**	**P1**	**P2**	**Target**	**P1**	**P2**	**Target**	**P1**	**P2**	**Actual**	**Target**
Sprint 8	69	4	20	0	0	10	144	0	25	213	4	217	55
Sprint 9			20			10			25				55
Sprint 10			20			10			25				55
Sprint 11			20			10			25				55

	Approved Reporting Change Control												
Sprint	**New Scope**			**Production Changes**			**Rework-Bugs-Defects**			**Total Added**			
	P1	**P2**	**Target**	**P1**	**P2**	**Target**	**P1**	**P2**	**Target**	**P1**	**P2**	**Actual**	**Target**
Sprint 8	40	0	20	1	0	10	37	8	25	78	8	86	55
Sprint 9			20			10			25				55
Sprint 10			20			10			25				55
Sprint 11			20			10			25				55

- **Sprint 8 Change Control Highlights**
  - Wave of End-to-End bugs and new scope held during Sprint 7 account for the high number of points of change control.
    - Software: Of the 217 points, 160 are Development complete
    - Reporting: Of the 86 points, 83 are Development complete

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Stephanie Smola
Alexis Ward
Abigail King
Tiffany Reinhold
Chris Martin

CONGRATULATIONS!!!

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Top Trainer: Alexis Ward

Most Materials Created

- Chris Martin
- Mikhaila Pearson
- Kelly Williams

Most Enthusiastic Participants

- Oscar Banda
- Daniel Veneros
- Cindy Palider

BU Support MVPs
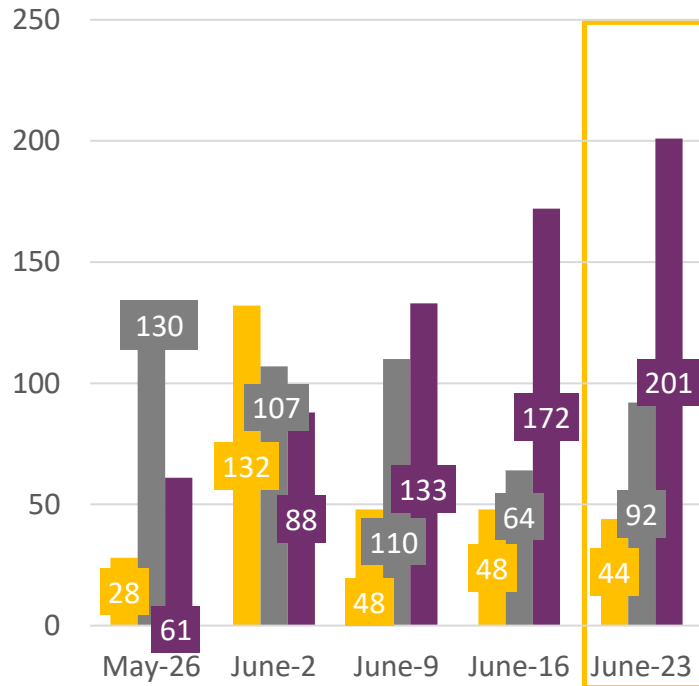
- Kim Liguzinski
- Carina Hughes
- Brandon Hooley

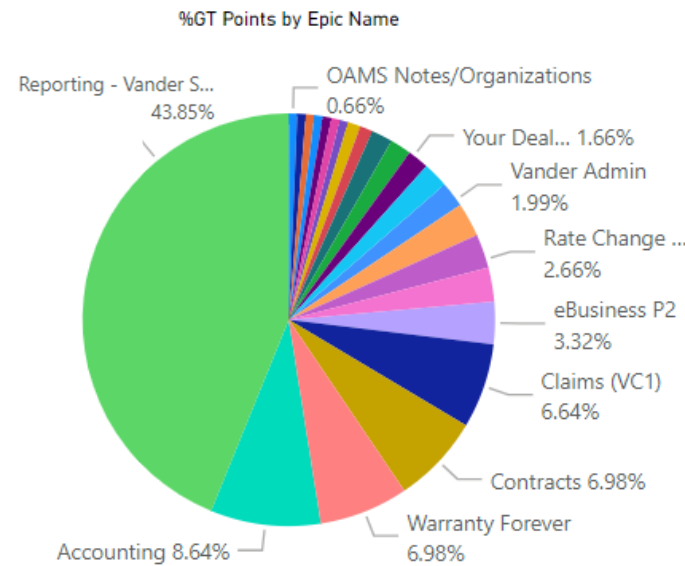**CONGRATULATIONS!!!**

Business Unit Testing Status – 6/23/2023

Need continued focus on testing as tickets are cleared of blockers or flags, feature testing progress continues in parallel with end-to-end testing

Weekly Testing Progress

Legend:
- Points Moved to UAT (Complete) in Past Week
- Blocked Points
- Testable Points

R1 Phase 1 Current Testing & Blocker Backlog Snapshot

%GT Points by Epic Name

- Reporting - Vander S... 43.85%
- OAMS Notes/Organizations 0.66%
- Your Deal... 1.66%
- Vander Admin 1.99%
- Rate Change ... 2.66%
- eBusiness P2 3.32%
- Claims (VC1) 6.64%
- Contracts 6.98%
- Warranty Forever 6.98%
- Accounting 8.64%

Link to Power BI Dashboard

Business Owner Assigned	Total Backlog (Tickets)	Blocked (Tickets)	Total Backlog (Points)	Blocked (Points)	Available for Testing (Points)
Abbey Flenoury	2	1	6	5	1
Abigail King	1	1	5	5	0
Alissa Wells	1	0	3	0	3
Allie O'Connell	1	0	2	0	2
Brandon Lamas	8	1	42	3	39
Carina Hughes	1	0	2	0	2
Gabby Roberts	1	0	2	0	2
Gretchen Seidel	2	0	4	0	4
Lori Hallissey	2	0	6	0	6
Maysoon Ben-Ghaly	9	3	26	9	17
Neil Payne	4	0	16	0	16
Rebecca Scolari	2	2	24	24	0
Tiffany Reinhold	22	7	105	42	63
(blank)	19	2	50	4	46
Total	**75**	**157**	**293**	**92**	**201**

Total points completed to date: 1,482

PROJECT HORIZON RAID LOG – Week of June 19th, 2023

ITEM	TYPE	TITLE	DESCRIPTION	STATUS	OWNER	DUE DATE	NEXT STEPS / RESOLUTION
01	I	Successful completion of End-to-End testing	End-to-end testing completion relies on successful testing of blocked areas. E2E testing continues to identify new defects, requiring additional testing	Ongoing/ Delayed	Mark Slyder	~~6/16~~ 6/26	• Focus development resources toward priority E2E areas, avoiding pulling them away for other activities • Continuing to retest critical areas, but still identifying new defects. Targeting next re-test on 6/26, for completion of E2E prior to Go / No-Go on 6/28
02	A	WM Transition PM FTE	Develop overall transition plan for WM Horizon responsibilities to Portfolio resources	Open	PMO	6/19	• Transition Plan approved, 2 Contractor roles filled • 1 FTE (Project Manager) candidate selected, starting 7/5 • Monthly meetings to track progress in place • West Monroe Team End Date 8/11
03	R	Business Testing – Feature/Functional Testing	Considerable backlog of tickets Ready for Business Testing	Open *In Progress*	PMO	Ongoing	• Focused coordination of flags/blocker resolution • Focused coordination with BAs and business testers aimed to reduce backlog by a target of ~100 points weekly • Additional incentives in place to encourage rapid business testing when tickets are made available • Seek leadership support to prioritize testing activities, if necessary

Calendar view of upcoming activities

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SUN	MON	TUE	WED	THU	FRI	SAT
	Sprint 8		Sprint 9			
		Change Request Review Mtg			Weekly Status	
	Agent and Dealer Training Sessions					
	Associate Training					
18	19	20	Training Development: Optional Office Hours — 22		23	24
	Sprint 9					
		Change Request Review Mtg	Steering Co Meeting		Weekly Status	
	Associate Training					
	15min BU-specific training development check-ins		Go / No-Go Decision			
25	26	27	28	29	30	July 1
	Sprint 9					
	Associate Training					
	Pre-Go-Live Readiness Survey		Change Request Review Mtg		Weekly Status	
2	3	(Holiday) 4	5	6	7	8
	Sprint 9		Sprint 10			
	Associate Training					
		Change Request Review Mtg	Steering Co Meeting		Weekly Status	Go-Live Weekend
9	10	11	12	13	14	15

Detailed Go-Live Weekend & Hypercare Process Planning is underway

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WM PMO and Portfolio IT leadership are holding regular workshops to define all Go-Live and Hypercare planning assets. These assets will provide a detailed blueprint for success throughout the roll-out, and can also be used to plan for Phase 2 rollout in November.

Go-Live Plan Assets
Target Complete Date: 6/30

- Go / No-Go Criteria
- Go-Live Communication Plan (Internal & External)
- Go-Live Roles & Responsibilities
- Detailed Resource Location & Logistics Plan
- Detailed Week by Week and Hour-by-Hour plan
- Go-Live Weekend Governance & Reporting Approach
- Go-Live Testing Approach
- Issue Management Approach Process
- Contingency & Roll-Back Planning

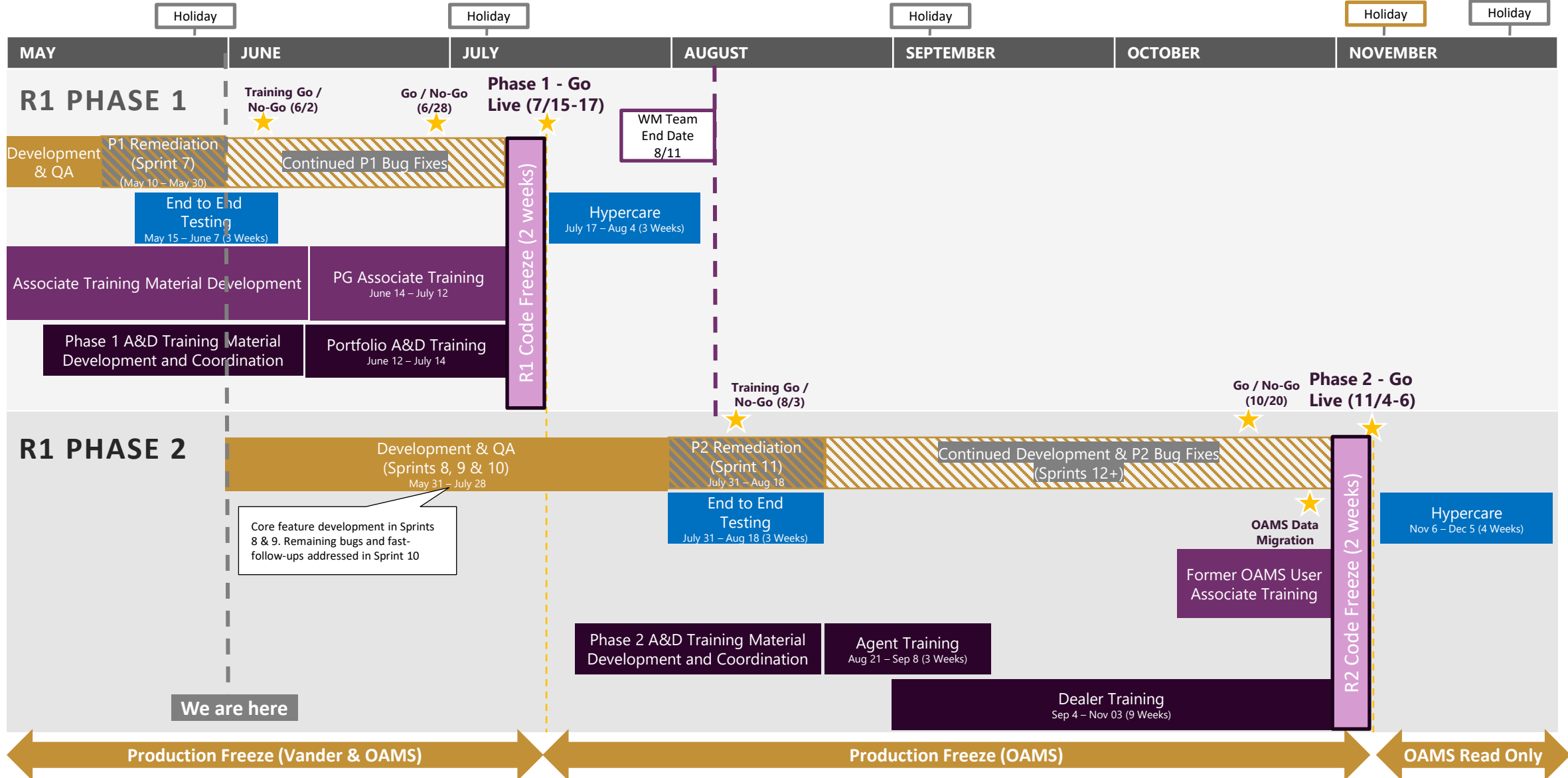| **Hypercare Plan Assets** |
| :---: |
| *Target Complete Date: 6/23* |

- Hypercare SLAs / KPIs
- Hypercare Communication Plan
- Hypercare Roles & Responsibilities
- Ticket Intake Process Outline
- Escalation Norms & Processes
- Response & Fix Approach
- Systems and Tooling

Project Horizon R1 Implementation Timeline

Holiday | **Non-Portfolio Holiday**   Holiday | **Portfolio Holidays**

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MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER

Holiday Holiday Holiday Holiday Holiday

R1 PHASE 1

Training Go / No-Go (6/2)

Go / No-Go (6/28)

Phase 1 - Go Live (7/15-17)

WM Team End Date 8/11

Development & QA

P1 Remediation (Sprint 7) (May 10 – May 30)

Continued P1 Bug Fixes

R1 Code Freeze (2 weeks)

End to End Testing
May 15 – June 7 (3 Weeks)

Hypercare
July 17 – Aug 4 (3 Weeks)

Associate Training Material Development

PG Associate Training
June 14 – July 12

Phase 1 A&D Training Material Development and Coordination

Portfolio A&D Training
June 12 – July 14

R1 PHASE 2

Training Go / No-Go (8/3)

Go / No-Go (10/20)

Phase 2 - Go Live (11/4-6)

Development & QA (Sprints 8, 9 & 10)
May 31 – July 28

P2 Remediation (Sprint 11)
July 31 – Aug 18

Continued Development & P2 Bug Fixes (Sprints 12+)

R2 Code Freeze (2 weeks)

Core feature development in Sprints 8 & 9. Remaining bugs and fast-follow-ups addressed in Sprint 10

End to End Testing
July 31 – Aug 18 (3 Weeks)

OAMS Data Migration

Hypercare
Nov 6 – Dec 5 (4 Weeks)

Former OAMS User Associate Training

Phase 2 A&D Training Material Development and Coordination

Agent Training
Aug 21 – Sep 8 (3 Weeks)

Dealer Training
Sep 4 – Nov 03 (9 Weeks)

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Production Freeze (Vander & OAMS)

Production Freeze (OAMS)

OAMS Read Only

Summary of Key Dates – Phase 2

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Legend | Date Changed

Phase 2	Start Date	Complete Date	Participants	Detail
Development & QA (Sprints 8, 9 & 10)	**Wednesday 5/31** *(Was 5/23)*	**Tuesday 7/28** *(Was 6/30)*	Development Team, BAs	Core feature development in Sprints 8 & 9. Remaining bugs and fast-follow-ups addressed in Sprint 10
End-to-End Test Case Development & Planning	**Wednesday 7/5** *(Was 6/13)*	**Friday 7/28** *(Was 7/12)*	BUOs & testers, BAs, WM	As Phase 2 sprints complete, development of any additional test cases for End-to-End testing take place, and will be finalized. End-to-end testing schedule will also be created.
Training Material Update for Phase 2	**Monday 7/12**	**Monday 8/14** *(Was 7/27)*	BUOs, Training SMEs, Power Users, WM	Update of all training materials to encompass phase 2 development Note: Majority of training materials will have been done in Phase 1
End-to-End Testing & Remediation	**Monday 7/31** *(Was 7/12)*	**Friday 8/18** *(Was 8/3)*	BUOs & BU Testers, Development	Total of 3 weeks for End to End testing after business testing is completed. Development on bugs identified during end-to-end remediate will take place throughout this period
Training Go / No-Go Decision	**Friday 8/3** *(New Milestone)*		BUOs, SteerCo	Confirmation that the system is ready for training to begin, and that it is ready to be introduced to agents & dealers
Training Delivery (Agents, Dealers)	**Tuesday 8/21** *(Was 8/7)*	**Thursday 11/3**	BUOs, Training SMEs, Power Users	1 month for Associates 1 month for Agents, 2 months for Dealers
Training Delivery (Associates)	**Monday 10/9** *(Was 8/7)*	**Thursday 11/3** *(New Milestone)*		
Go / No-Go Decision	**Friday 10/20** *(Was 8/4)*		BUOs, SteerCo	Go / No-Go meeting and decision hosted a before go-live
Phase 2 Go-Live	**Friday 11/3**	**Monday 11/6**	IT / Development	Go-Live over the weekend – Available on Monday

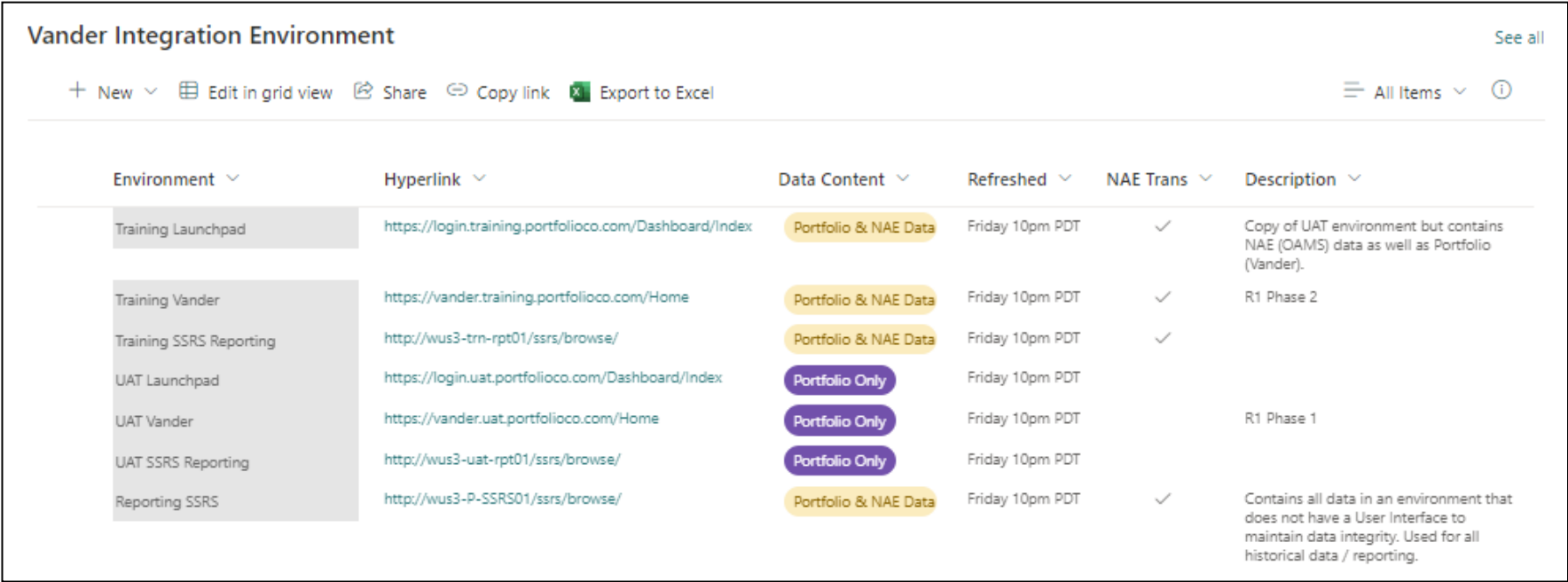# Roles and Responsibilities In the Context of Business Testing & Change Management

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Roles	Testing	Training	Key Responsibilities
Business Unit Owner	Yes	Yes	• Coordinate Testers as needed • Collaborate in the development of the training curriculum, development and delivery plans, and testing efforts for their business unit • Provide sign-off of training materials & testing scenarios for their business unit • Provide final Readiness Sign-Off for End-to-End Functionality • Validate required handoffs / dependencies between Business Unit(s)
Power User / Training Content Developer		Yes	• Build training materials (SOPs, facilitation guides and course outlines) • Schedule and deliver Live Demos and Job Shadowing sessions • Support the Training SME on providing feedback and reviews of How-To Articles
Training SME / Training Content QA		Yes	• Validate their BU's training curriculum, development and delivery plans • Review and provide feedback on training materials (SOPs, facilitation guides and course outlines) developed by Power Users • Providing feedback and reviews of How-To Articles
BU SME	Yes		• Validate and finalize all test scenarios and create test case scripts • Identify required handoffs / dependencies between Business Unit(s)

Business Unit Testing Q&A

SharePoint site: https://ifshome.sharepoint.com/sites/ITProjectsTeam-ProjectHorizonNAEIntegration

➢ *Note*: We will work on adding all your team members into the site this week.

Integration Environments link: Vander Integration Environments

➢ This is also added to the Power BI dashboard in the upper left corner.

Vander Integration Environment

See all

+ New ⌄   ⊞ Edit in grid view   🔗 Share   🔗 Copy link   📊 Export to Excel

≡ All Items ⌄   ⓘ

Environment ⌄	Hyperlink ⌄	Data Content ⌄	Refreshed ⌄	NAE Trans ⌄	Description ⌄
Training Launchpad	https://login.training.portfolioco.com/Dashboard/Index	Portfolio & NAE Data	Friday 10pm PDT	✓	Copy of UAT environment but contains NAE (OAMS) data as well as Portfolio (Vander).
Training Vander	https://vander.training.portfolioco.com/Home	Portfolio & NAE Data	Friday 10pm PDT	✓	R1 Phase 2
Training SSRS Reporting	http://wus3-trn-rpt01/ssrs/browse/	Portfolio & NAE Data	Friday 10pm PDT	✓	
UAT Launchpad	https://login.uat.portfolioco.com/Dashboard/Index	Portfolio Only	Friday 10pm PDT		
UAT Vander	https://vander.uat.portfolioco.com/Home	Portfolio Only	Friday 10pm PDT		R1 Phase 1
UAT SSRS Reporting	http://wus3-uat-rpt01/ssrs/browse/	Portfolio Only	Friday 10pm PDT		
Reporting SSRS	http://wus3-P-SSRS01/ssrs/browse/	Portfolio & NAE Data	Friday 10pm PDT	✓	Contains all data in an environment that does not have a User Interface to maintain data integrity. Used for all historical data / reporting.

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ITEM	TYPE	TITLE	DESCRIPTION	STATUS	OWNER	DUE DATE	NEXT STEPS / RESOLUTION
01	D/R	Method of External Training Delivery	The decision was made to deliver external training via recorded Zoom webinars and not leverage LMS (ProProfs)	Closed	Chad Millspaugh	4/14	• While recorded webinars solves resource bandwidth constraints, there is risk to overall external change adoption due to disruption of standard content delivery through the LMS. • Portfolio University will be used, but the connection to the ProProfs LMS will not.
02	A	Feature Overview for testers and trainers	Ahead of testing and training development, testers and training power users will need to receive an overview of how the new features or new processes work	Closed	PMO	2/24 & 3/24	• Ensure BAs and/or BUOs are providing testers and training power users with a demo or overview of the new functionality prior to beginning the testing and training development efforts • As per a survey distributed to all trainers, ~80% of trainers reported they feel comfortable with the training development efforts. For the other ~20, remedial actions have been developed and will be shared with BUOs week of 3/27. • Prepared recommendations and mitigation tactics by business unit and will engage with the pertinent leaders to coordinate the delivery of the support activities.
03	A	Agent and Dealer Training Coordination	Additional support is required to help coordinate and manage the training efforts for agents and dealer training	Closed	PMO / Sales & Marketing	3/31	• Ryan Dolak appointed as Training Coordinator to help facilitate the planning, development and delivery of Horizon training materials for agents and dealers • Jordan Rhoads assigned as the West Monroe resource to provide change management advisory for Horizon Agent & Dealer training, including guidance and templates around best practices for external training, and review of Client-created Agent and Dealer training curriculum and materials and provide feedback.
04	R	Developer and BA Resources	Competing priorities for Developers and Business Analysts	Closed	Mark	TBD	• Additional Developers added beginning Sprint 4 • Monitor and escalate when critical resources are not working at expected impact • WM attending Dev syncs to progress communication and to quickly resolve blockers
05	R	Project Visibility	Competing projects within Portfolio, visibility and priorities (Notable project Zenith, and phone system roll-out)	Closed	Mark & Andy	TBD	• Ryan Dolak started Jan 3rd, 2023 • Ryan to create view of competing projects (will include Zenith and other strategic projects) • Continued communication through established governance structures

06	A	Duplicate Accounts in Vander	Concerns raised about the plan to have duplicate accounts in Vander. Workarounds are expected to be substantial for some business units (Reinsurance)	Closed	Brandon, Andy, Mark	3/17	• Next steps and a resolution plan has been developed. Stakeholder groups including Sales, Remittance, Re-Insurance, IT, and WM PMO will:
							  • Identify all duplicate accounts to be merged
							  • Assign all merger actions
							  • Create a project plan with technical steps and timing of merger, and test merger execution
							  • Execute merger during go-live weekend

07	R	Ownership, Scope & Overall Agent & Dealer Training Experience	Ownership, alignment on scope and overall training experience are currently a gap and could impact Horizon	Closed	Sales & Marketing	3/31	• Chad Millspaugh identified as owner • Christine Chaplin assigned to work with Chuck Chase prior to his departure and fill the A&D training coordinator role • Ryan Dolak and Jordan Rhoads have meetings scheduled with Sales & Marketing, Business Unit owners, and A&D training stakeholders to discuss gaps and determine next steps
08	D	A&D Video Content	The decision was made to not create How-To Videos for Phase 1 or Phase 2 A&D training	Closed	Chad Millspaugh	3/31	• How-To Videos have been deprioritized for both Phase 1 and Phase 2 of Horizon. A video vendor was discussed during multiple forums, but due to constraints with capacity and expertise, the decision to not include How-To Videos was made.

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09	D/R	A&D Training Coordinator Role	Chuck Chase is departing Portfolio on 5/1, and Brandon Lamas has been designated as the Training Coordinator	Closed	Chad Millspaugh	4/21	• With Chuck Chase's departure, a few resources were named to take over his responsibilities related to training coordination. Christine Chaplin and Brandon Lamas were named, but the decision has been made to only select Brandon for the role to allow Christine to focus on her current responsibilities. • A backfill for Chuck Chase has been hired, starting next week
10	D	A&D Training Content Delivery Expectations	Determine A&D training content delivery team and schedule for Phase 1 and 2	Closed	Chad Millspaugh	4/21	• Primary sales delivery team members will be Chad Millspaugh and Brandon Lamas, with support from the business units and the remainder of the Sales Team where needed • Webinar dates are being finalized
11	D	Method of External Training Delivery	Given the decision to not leverage the LMS for training delivery, a new platform to store and deliver training materials to agents and dealers needs to be created	Closed	Chad Millspaugh / Mark Slyder	4/28 – solution defined	• There is risk to overall external change adoption due to disruption of standard content delivery practices through the LMS. • Internal site created, Sales to review with IT
12	I	A&D Coordination	Early Agent & Dealer Training Material Development dates have been missed	Closed	Chad Millspaugh	5/19	• New dates have been identified for A&D webinar schedule and communications: • *Webinar schedule definition: 4/28 (Completed - Schedule Defined)* • *Communication to Internal Associates supporting training: 5/2 (Completed – sent 5/3)* • *Communication to Agents: 5/19* • Extensive tracking to ensure new dates are not missed is in place
13	A	Associate Training Materials Creation	Associate training content for Mechanical Claims has started to fall behind. Training development is heavily concentrated on one person and progress has stagnated. Training delivery dates for this team are expected for early June	Closed	Neil Payne	5/26	• The Claims team has decided to prioritize Phase 1 SOPs and live session materials to stay on track for training delivery in June, and they've involved additional associates to support on training content development • Targeting completion of Phase 1 materials and scheduling of live sessions by 5/31; currently over 60% of prioritized materials are in process