

ASSETTE 

# Assette Implementation Team

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[www.assette.com](http://www.assette.com)

# The Assette Implementation Process

There are eight steps to implementing Assette Software.

1. Gather a Team
2. Train Business/Data Analysts & Developers  
(and System Administrators and Qualitative Data Managers)
3. Conduct Business & Data Analysis
4. Develop & Test Data Artifacts
5. Train Authors
6. Author Templates & Test Output
7. Train Sales & Client Service Users
8. User Acceptance Testing & Go Live

## Gather a Team

Identifying the right people for your implementation team is key to success. Below are the roles you will need. Where possible having one person with multiple skills is recommended.

Role	Tasks	Experience & Skills
<p><b>Project Manager</b> Ownership of the implementation process and work.</p>	<p>Maintain a project delivery plan, coordinate tasks and activities among team members and the Assette team and remove any roadblocks throughout the process.</p> <p>Monitor delivery timelines, identify key risks and issues, coordinate issue resolution.</p> <p>Maintain Project Governance practices (Meeting cadence, project reporting, stakeholder management).</p> <p>Provide guidance on prioritization and/or changes that arise.</p> <p>Engage business users for clarifications as needed.</p>	<p>Prior exposure to IT software project management.</p> <p>Experience working with distributed IT/software and business teams.</p> <p>PMP/ACP or any equivalent project management qualification.</p>
<p><b>Business/Data Analyst</b> Understands your firm's content and analyzes the data requirements needed to generate your content.</p> <p>Arranges data (coming from Data Blocks) in Data Objects to match content needs.</p>	<p>Document and clearly articulate data requirements to your team, especially developers.</p>	<p>Business data analysis skills.</p> <p>Investment industry certification is a plus.</p> <p>Previous experience in collaborating with developers about data needs.</p>

Role	Tasks	Experience & Skills
<p><b>Developer/ Data Engineer</b></p> <p>Develops data artifacts that surface your data in Assette. Arranges that data to match content needs.</p>	<p>Code and develop in Python, and if needed SQL.</p> <p>Develop Data Blocks in Assette.</p> <p>Support Business/Data Analysts in creating Data Objects.</p>	<p>Experience in working with data and an understanding of how your firm's data is organized.</p> <p>Ability to code in Python and SQL (if appropriate).</p> <p>Knowledge of YAML.</p> <p>General reporting/BI experience.</p>
<p><b>Tester(s)</b></p> <p>Performs testing to validate the accuracy of the data artifacts and content being produced in Assette.</p>	<p>Compares output generated in Assette – output of data artifacts and content – to external sources to validate accuracy.</p>	<p>Prior QA testing experience on software implementation projects.</p> <p>Ability and knowledge to procure data and content to test against.</p> <p>Understanding of data testing.</p>
<p><b>User: System Administrator</b></p> <p>Configures software, and workflows.</p> <p>Manages users.</p>	<p>Sets up software configuration for the firm.</p> <p>Performs administration tasks related to users.</p>	<p>Prior systems administration experience.</p> <p>Knowledge of IT/ business systems.</p>
<p><b>User: Qualitative Data Manager</b></p> <p>Manages the qualitative data regarding firm, strategies, people, and disclosures.</p>	<p>Regularly gathers necessary qualitative data.</p> <p>Inputs qualitative data into Assette for initial set up and as updates are needed.</p>	<p>Experience working with RFP systems and similar.</p> <p>Understanding of and access to the firm's qualitative data.</p>
<p><b>User: Author</b></p> <p>Authors/creates templates for content.</p>	<p>Specifies and sets up brand identity elements.</p> <p>Creates templates using Microsoft Office-based editors.</p>	<p>Experience in creating content you plan to automate.</p> <p>PowerPoint, MS Word and Excel <b>power user</b>.</p> <p>Knowledge of investment data, disclosures, and your content.</p>
<p><b>User: Sales and Client Service</b></p> <p>Represent users who will be finding and sharing content.</p>	<p>Use content and provide input to authors.</p>	<p>General familiarity with using business software.</p> <p>Understanding of your content.</p>
<p><b>Project Sponsor</b></p> <p>A senior business leader with the right level of authority and understanding of project goals, capable of steering and supporting the team.</p>	<p>Varies by firm.</p>	

**NOTE:** Consider using Assette’s implementation partners to fill some roles. They are pre-trained and ready to start implementing Assette software.

# Appendix A: Detailed Breakdown of Time and Effort by Role

The following graphs highlight the anticipated hours (in white text) by role for each phase of the implementation and the overall expected role utilization.

