

# OmniCore Implementation Checklist

## Week 0: Alignment & Scoping

- â€¢ Confirm executive sponsor and implementation lead.
- â€¢ Capture success metrics, reporting cadences, and stakeholder map.
- â€¢ Inventory CRM, finance, support, marketing, and ticketing platforms.
- â€¢ Gather sample board or investor updates to mirror tone and structure.
- â€¢ Define security review path and procurement milestones.

## Week 1: Data Foundations

- â€¢ Provision OmniCore workspace and enforce SSO + SCIM baseline.
- â€¢ Set up source system connectors with least-privilege access.
- â€¢ Validate field mappings for accounts, opportunities, invoices, and tickets.
- â€¢ Align naming conventions for metrics, teams, and territories.
- â€¢ Establish daily or hourly sync cadence per source system.

# OmniCore Implementation Checklist

## Week 2: Narrative & KPI Blueprint

- â€¢ Draft KPI catalogue covering finance, revenue, support, and marketing.
- â€¢ Map KPI owners and escalation paths for variance ownership.
- â€¢ Create first-pass narrative templates for board, ELT, and functional reviews.
- â€¢ Configure alert thresholds for cash runway, churn risk, and pipeline health.
- â€¢ Review AI governance requirements with security and compliance leads.

## Week 3: OmniChat Enablement

- â€¢ Curate starting knowledge base: policies, SOPs, escalation paths.
- â€¢ Define OmniChat guardrails, sensitive data handling, and audit logging.
- â€¢ Pilot assistant with success, support, and finance champions.
- â€¢ Capture deflection scenarios and add canned responses for quick wins.
- â€¢ Iterate prompts and tone guidance based on champion feedback.

# OmniCore Implementation Checklist

## Week 4: Testing & Validation

- â€ Run end-to-end data validation for core KPIs across each persona.
- â€ Confirm lineage links from narrative statements back to source evidence.
- â€ Execute access reviews and record audit results for compliance teams.
- â€ Test alerting flows to email, Slack, and ticketing destinations.
- â€ Dry-run ELT briefing with champions to gather usability feedback.

## Week 5: Launch Preparation

- â€ Finalise enablement materials and rollout comms timeline.
- â€ Schedule leadership workshops and floor-walks.
- â€ Lock in support model for post-launch hypercare.
- â€ Configure monitoring for connector health and sync latency.
- â€ Ensure procurement documentation and MSAs are executed.

# OmniCore Implementation Checklist

## Week 6: Go-Live & Hypercare

- â€¢ Launch OmniCore narratives and OmniChat to agreed audiences.
- â€¢ Provide daily office hours for data, workflow, and assistant questions.
- â€¢ Track adoption, response accuracy, and variance resolution speed.
- â€¢ Capture enhancement backlog and prioritise quick wins.
- â€¢ Transition ownership to steady-state operations team with clear SLAs.

## Success Metrics to Monitor

- â€¢ Time to produce board narrative packs.
- â€¢ Variance detection and resolution cycle time.
- â€¢ OmniChat deflection rate and satisfaction score.
- â€¢ Executive engagement with KPI drill-downs.
- â€¢ Accuracy of lineage links back to source systems.