

Foundation Tune-Up Service



Description

Service to analyze existing Foundation environment, document current state, highlight areas performing well and recommend configuration/ process improvements to increase customer value from the solution.



Pain Points

Firms often do not have optimal Foundation configuration and processes in place, which limits the tremendous value they could be receiving from the solution.

Reasons for this include:

- **Configuration Challenges** – A lack of awareness surrounding the optimal Foundation configuration design can lead to underutilization of its capabilities.
- **Staff Turnover** – Frequent staff turnover within the firm can result in a loss of knowledge about the system and its functionalities.
- **Process Deficit** – The absence of processes to ensure the ongoing health of the system can lead to performance issues and inefficiencies.
- **Missed Opportunities** – Ignorance of the additional use cases that Foundation can provide may result in missed opportunities for optimization and productivity.
- **Outdated Practices** – Customers who implemented Foundation a long time ago may not be leveraging the benefits of recently developed best practices and advanced product functionality.



Outcomes/Benefits

- **Performance Insights** – Pinpoint areas where the firm's Foundation implementation is excelling, promoting effective practices.
- **Best Practice Alignment** – Identify and rectify areas where the firm's implementation deviates from recognized best practices, ensuring optimal use of Foundation.
- **Functional Fixes** – Obtain expert guidance to resolve issues related to core functionality, enhancing system efficiency and user experience.
- **Value Discovery** – Explore additional use cases to derive more value from Foundation, expanding its utility within the firm.
- **Expansion Opportunities** – Unearth potential avenues to introduce Foundation to additional communities within the firm, fostering greater collaboration and productivity.

Deliverables:

- Foundation Tune-up report, which includes results of the audit, description of remedies, guidance on how to implement them, and recommendations for further optimization.



Firm Resources Required

- **Foundation Business Administrator (FBA)** – Complete the tune-up questionnaire, engaging other firm resources, as necessary. Answer follow-up questions from Foundation consultants regarding business requirements, configuration decisions, and business processes.
- **IT Team** – Provide access to firm's Foundation environment.