



Project Charter: New Supplier

A collaborative agreement outlining the specific steps, responsibilities and timelines needed to achieve a successful VIP Implementation.

* Project charter to be used in collaboration with the [SRS Training Plan](#)

Charter Details

Account Name:		Date Delivered:	<input type="text" value="Date"/>
----------------------	--	------------------------	-----------------------------------

Project Team/Key Stakeholders

Primary Roles	Name	Responsibilities
VIP Lead Application Trainer:		<ul style="list-style-type: none">• VIP main points of contact during implementation• Assist in developing and executing a project timeline and plan tailored to the customer's needs
VIP Master Data Specialist:		
Customer Project Sponsor(s):		<ul style="list-style-type: none">• Advocates for and supports VIP implementation• Invests resources/time to dedicate to learning admin responsibilities• Acts as liaison between VIP and customer end users

Project Summary

VIP (Vermont Information Processing) provides beverage-specific software designed to improve workflow processes, give suppliers more visibility into their markets, and streamline communication across the three tier industry. Successful onboarding of VIP Supplier Reporting Services (SRS) includes Data Collections, Brand Finder and Sales Automation applications.

Typical implementations take approximately 3–6 months from the time your account is assigned to a VIP Implementation Team, which includes a Lead Application Trainer and a Master Data Specialist. The overall timeline can vary depending on several factors, such as:

- The number of distributors in your network.
- The routing software that your individual distributors use.
- The volume and complexity of the brands/items you represent.
- The internal resources you can commit.

Core Applications:

- **SRS/Nexus:** Supplier hub to manage users, monitor distributor certification progress, adjust sales hierarchy, and address item mapping errors.
- **Item Catalog:** Captures and manages essential master item data, supporting other VIP applications.
- **iDIG:** A web based business analytics application that provides business intelligence through comprehensive sales, distribution, inventory, and KARMA results reporting.
- **KARMA:** Mobile CRM for survey responses, contact details, account attributes, and mobile iDIG reporting.
- **Chain Call Management (CCM):** A web application that tracks and analyzes inventory and store alerts, manages promotional events, and shares event plans with distributors and internal teams.
- **Brand Finder:** Helps consumers locate retail outlets carrying your products.

Project Milestones

Milestones	Target Date	Recorded Training Link(s):
Project Kick-Off Call	<input type="text" value="Date"/>	
VIP Help Center Training	<input type="text" value="Date"/>	
LMS (Learning Management Software) Introduction	Coming soon!	
Item Catalog Training	<input type="text" value="Date"/>	
SRS/Nexus Training	<input type="text" value="Date"/>	
iDIG & KARMA Admin Trainings	<input type="text" value="Date"/>	
Brand Finder Training	<input type="text" value="Date"/>	
iDIG, KARMA and CCM (if applicable) Team Trainings	<input type="text" value="Date"/>	
Turnover to On-Going Support	<input type="text" value="Date"/>	

Project Assumptions

#	Assumption	Acknowledgement (Initial each one)
1	The Customer will review and approve proposed project timelines.	
2	The Customer will provide Project Sponsor(s) dedicated to learning admin responsibilities necessary for a successful implementation.	
3	The VIP Implementation Team will provide training resources and documentation for identified teams according to the established Project Plan.	
4	The VIP Implementation Team will ensure the customer's long-term success by facilitating a seamless transition to VIP on-going support.	

Project Objectives/Shared Goals

#	Objective	Deliverables
1	Identify committed resource(s) from customer	Establish committed customer project sponsor(s)
2	Build strong foundation	Customer will provide VIP with employee organizational structure and sales execution goals to best determine distributor, employee and item hierarchies
3	Increase visibility	Highlight how iDIG, KARMA and CCM (if applicable) provide insights and analysis of sales/distribution/inventory and survey collection data
4	Reduce operational inefficiencies	Provide best-practice expertise in standardizing workflows and maximizing the use of VIP integrations both internally and externally
5	Establish self sufficiency	Equip customers with the necessary resources and materials to effectively manage and maintain their environment independently

Work Completion

The Customer has successfully integrated Supplier Reporting Services in accordance with the SRS Training Plan .

Project Approval

Primary Roles	Signature	Date
VIP Lead Application Trainer:		📅 Date
VIP Master Data Specialist:		📅 Date
Customer Project Sponsor(s):		📅 Date
		📅 Date

Resources

- **Help Center:** support.vtinfo.com
- **Nexus:** srs.vtinfo.com/apps
- **Supplier Site:** srs.vtinfo.com/supplier
- **Item Catalog:** ic-direct.vtinfo.com/ic-direct
- **Brand Finder:** srs.vtinfo.com/apps/#brand-finder-overview
- **iDIG:** reports.vtinfo.com
- **KARMA:** <https://apps.apple.com/us/app/vip-karma/id1191951808>
- **Chain Call Management:** <https://srs.vtinfo.com/apps/#ccm-dashboard>