Overview: SRS Sales Turnover

What to expect with SRS Implementation

Whether you have already made your decision or are still evaluating, we want to give you a clear outline of what implementation with VIP for Supplier Reporting Services (SRS) looks like.

Once your contract is signed and returned, VIP will place you in the implementation queue. Your start date will depend on the number of suppliers already in progress and those ahead in the queue. After your agreement is finalized, VIP will provide an estimated start date.

When your implementation begins, you'll be assigned a dedicated team that includes a Lead Application Trainer and a Master Data Specialist. Most implementations take about 3–6 months, though the exact timeline depends on several factors:

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

Phase 1: Initial Setup & Data Collection

1. Preparation: Master Data Submission

While you wait for a VIP Implementation Team to be assigned, VIP will ask you to complete a template with your item and distributor information. Providing this upfront allows your Master Data Specialist to begin setup immediately once your account is assigned.

- **Items**: include any product sold within the past 24 months, as VIP will collect up to two years of historical data where available.
- **Distributor list**: include all active distributors currently selling your products. If you plan to add distributors during the implementation time period, note their expected start dates.
    - Please reference these videos for instructions on completing these templates. (Password: vip123)

*Failure to submit your completed item and distributor templates may delay your project assignment. Please submit it promptly to avoid delays.

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2. Project Kick-Off Call

Once your VIP Implementation Team is assigned, we will schedule a Kick-Off meeting. During this call, we will:

- Outline the **Project Charter** to define key stakeholders from both VIP and the customer, and establish expectations and milestones.
- Review your **item and distributor lists** to ensure alignment.
- Provide a **Commitment Letter template** for you to customize and send to distributors, requesting their sales data submissions to VIP.
    - Distributors will sign and return this letter to VIP and begin the setup process.
- Introduce **VIP Help Center** as the process for contacting VIP, accessing resources, and submitting support tickets.

*The setup, testing, and validation of distributor data files typically takes **4–8 weeks per distributor**, depending on their process and software.

Phase 2: Master Data & System Activation

3. Billing Commences

Billing for services and software begins when **at least one distributor is certified**. Your first invoice will include:

- Software Implementation and Training fees.
- One-time Distributor Certification fees for certified distributors.
    - Any additional distributors certified after the first invoice will be added to that month's invoice.
- Fees for Data Collections and any software in use at that time.
    - iDIG and KARMA fees are billed only for active users. Even if the software has not been rolled out to your full team, VIP will bill for users currently active as defined in the software exhibit of your contract.

4. Data Validation & Admin Trainings

Our team will work with you to establish your master data and apply best practices for downstream success. We will configure item attributes, review distributor enrollments, and set up users.

This process includes:

- **Item Catalog**
    - Configure brand and item attributes.

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- **SRS/Nexus**
    - Review of Distributor enrollments and hierarchies.
    - Set up users and roles within your organization.
    - Identify item errors/repack issues.

Once at least one distributor is certified and data validation is complete, we will activate your iDIG and KARMA environments and review:

- **iDIG**
    - Admin settings and company defaults.
        - Ensure master data is set up correctly, review and implement any necessary hierarchy adjustments.
- **KARMA**
    - Customization options and effective survey strategies.

Phase 3: Application Integration & User Training

5. Brand Finder Set Up

Your VIP Implementation Team will work with you to help integrate Brand Finder (where to buy) into your website. It is important to remember that VIP provides guidance only and does not offer web development services for integrating the Brand Finder tool into your website.

Custom integration types:

- **API (web service)**: embed code to build into your website.
- **iFrame (VIP Hosted Widget):** links directly to your website.

Our team will also review Brand Finder's reporting and analysis features.

6. Team Trainings (iDIG, KARMA, CCM)

Your Lead Application Trainer will conduct trainings on the software purchased, as licensed under your agreement. These trainings will include but are not limited to:

- Introduction to KARMA
- Beginner/Intermediate iDIG
- KARMA reporting within iDIG
- Advanced iDIG
- Event set-up in CCM (if applicable)
- CCM reporting within iDIG (if applicable)

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Phase 4: Ongoing Support Transition

7. Turnover to On-Going Support

Once implementation is nearing completion, we will begin transitioning you to one of VIP's ongoing support teams. Each support team consists of subject matter experts who will provide guidance to ensure your long-term success with VIP.

During this process, we'll review the VIP Help Center ticketing system and highlight the available support resources.

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