

How to Plan for a Successful Finch Deployment

To ensure a successful deployment of the Finch Suite software system, we recommend following the *Ten-Step Plan* outlined below. While installing Finch can definitely be more involved and complex than setting up a simple desktop application like Word or Excel, by following this plan and committing personnel resources to the project, we are prepared to guide you through a successful and smooth deployment as well as assist you in your commercial roll-out of the Finch platform to your entire end user community of researchers and scientists.

Step 1: Identify Project Lead: Key to the successful delivery of more complex software systems is the identification of a project lead. This person doesn't necessarily need to be the end-all expert on everything covering the lab's workflow, business standards, or IT management. However, this person should champion the program deployment and know where to go when additional people or resources are required throughout a Finch deployment. This person is most commonly the lead lab manager for the facility or a trusted "get-work-done" staff member.

Step 2: Gather Documentation and Investigate Your Lab's Workflow: Assembling all the supporting documentation into a single location is an important step in a successful Finch deployment; you most likely will want to make printed copies of all the docs for key stakeholders. Initially, take a moment to write down the steps you take for managing your lab's workflow. Describe the key processes: Are orders paper based or do you accept email orders? How do you take orders (single tubes, strip-well tubes, or plates)? What instruments are you using? How would you like your users, groups and projects set up? How do you distribute and analyze data today? Which processes are important to automate? The more you know about each step of your workflow, the more we can help you understand where Finch will help.

Step 3: Pull Together Key Stakeholders: Set up a working team which will review the workflow, associated processes, and Finch documentation. Incorporate key business and IT stakeholders into the team as appropriate. Also include a small number of your users so they can bring their perspective to the process. Again, the more detail you can provide to Geospiza about your workflow, the more we can help configure Finch to better meet your automation requirements.

Step 4: Engage with Geospiza Delivery Team: Besides this Guide, you will want to review the Product Data Sheet(s) for your solution along with supporting delivery documentation such as Geospiza's *System Requirements* and *Storage Calculator*. As questions arise, telephone and email assistance is available to all customers from 8:30AM to 5:00PM M-F PT by calling (206) 633-4403 or emailing support@geospiza.com. Geospiza's Delivery team will work with you to build a deployment timeline with milestones and deliverables, all of which will be documented in a Deployment Plan covering Geospiza's as well as Customer responsibilities and deliverables. With the delivery team, you will arrange for:

A) Your Finch Installation: One of our IT subject matter experts (SME) will work with you to gather required system information, to arrange for weekly status and staging discussions about your system hardware, software, and network access, and ultimately to schedule your installation. Note that we require (1) a separate staging server as well as a production system, and (2) remote access to your system to perform the installation for you as well as to provide on-going support. Setting up remote access can take time, especially if coordination with an organization's IT team and its policies is required, and this will be factored into your deployment plan. Default Finch installation can be done remotely or on-site depending on the complexity of the delivery requirements, however, system configuration to match your workflow to Finch capabilities usually is done on-site.

B) System Configuration: Once system components are prepped and ready, then a Geospiza installation engineer will deliver your Finch installation and configuration based on the deliverables and date(s) mutually agreed upon in your Delivery Plan. The installation engineer will review your lab's workflow from an IT perspective, help you configure site-specific IT connections, configure your initial Finch database, set up email and data distribution nodes, and configure connectivity to any scientific analysis functionality included with your purchase. Interoperability with Geospiza supported 3rd party software or tools and/or integration of

software development provided by Geospiza's Solution Services also will be confirmed. Your IT representative, Instrument technician(s), and Lab Manager will want to participate throughout the planning and delivery process. The installation engineer will configure both staging and production servers for initial customer acceptance, and then on-going customer verification testing can be done on the staging server prior to any changes being updated to your production system.

C) Training Session(s): As soon as possible after your system configuration is completed, Geospiza will send a trainer on-site to familiarize your team with the capabilities of Finch. During this multi-day session the trainer will review your lab's workflow, and walk you through Finch capabilities such as system administration, project/group/folder configuration, order placement, data transfer to and from your instruments, and results distribution and viewing. Analytical tools also will be reviewed if purchased. Up to twelve (12) managers, technicians and selected power users will find this training an invaluable way to getting started quickly and easily with Finch.

Note that this delivery process will be repeated should software updates ever be deployed.

Step 5: Practice, Practice, And Practice: Once your Finch server is up and running, ensure that your project lead and lab technicians practice using Finch. Plan to spend at least a few days working with the system as you would if you were using it in the lab. As questions arise, you should review your Finch Training materials and product documentation first to see if you can work through questions yourself. Your initial goal should be to mirror your current manual production workflow while ramping up the lab team on how to use Finch and addressing any of their concerns that might come up. During this step, plan on accepting and delivering sequencing orders as you previously have done, and have the lab team enter orders into Finch on behalf of your end-users. If things go smoothly, plan to operate in this mode for the next week or two (i.e., orders come in the "old way", the lab team place and track orders the "new way" using Finch, and orders go back out the "old way"). As the lab team becomes proficient in using Finch, then begin to put together a commercial deployment plan following Steps 6-10.

Step 6: Power User Roll-out: Now that the lab team has become familiar with Finch, it is time to get some Power Users involved. Power Users typically are your most experienced end-users. Begin by adapting the Geospiza training PowerPoint slides to train your end user community how to use Finch, focusing on how to log in, how to set up a user account, how to place orders, how to get results, etc. This training should focus on the end user experience, and therefore can be much shorter in duration. Plan to hold a one hour training seminar for the power user group to get their input on the presentation materials and new process. Provide them accounts on the system, show them how Finch works for them, and encourage them to start using the system. If you can get 3-5 Power Users familiar with the system, they can help in training additional users, plus identify any areas where further education is required. Chapter 1 Getting Started of the User Documentation should be pre-requisite reading for your Power Users prior to training. You also may want to add a supplement to your Finch Server Home Page to specifically describe your laboratory's workflow and the order process.

Step 7: Full Deployment to End User Community: Once the Power Users are comfortable with the system and there is consensus to proceed with full deployment, it is now time to announce Finch to your entire end-user community. Our recommendation is that you hold a minimum of three one hour sessions spread out over the course of several weeks. Each session provides the same content, so an end-user would have a choice of sessions to attend, and would need to attend only one of the sessions. We recommend that you hand out Chapter 1 Getting Started as prep material for the session. The goal of each session is to introduce Finch to your end-user community, give a brief demo, walk through questions that arise from their review of Chapter 1, and point them to resources where they can get help (i.e., your facility's web site or the online Geospiza Resource Center at www.geospiza.com/resource-center.htm). Finally, we recommend that you set a "drop-dead" date that is about 1-2 months out at which point you will no longer accept sequencing orders using the "old way" ... all new sequencing requests will need to come in the "new way" via Finch.



Step 8: Attend Advanced Finch Training: For those labs seeking to maximize their software investment, Geospiza offers advanced training sessions for Finch capabilities. These sessions are sold separately, and while not required for deployment, many of our customers find these to be invaluable for the lab technicians who want to facilitate how to operate Finch in the best way possible. Additional Web-based remote familiarization sessions allow us to review your progress to date and help you understand any features that may be giving you difficulty. Or, you may choose to purchase a follow on training session held either on-site or at Geospiza's corporate offices in Seattle, WA. A targeted agenda can focus in on specific areas of interest.

Step 9: Document and Plan for Growth: As your lab and end-users become proficient with Finch, and your data volumes grow, you will need to plan and manage your lab's growth. You will need to monitor and maintain your staging and production hardware and operating system, implementing updates or replacement(s) as appropriate. You should monitor, plan for, and add disk space as your volume grows. You also are responsible for implementing and maintaining data security and data back ups.

You also may find that you would like to add capabilities, instruments, or automation to your workflow over time. As business needs change, then contact Geospiza about its Solution Services which can provide the expertise to extend the capabilities of Finch to meet your new business requirements.

Step 10: We are Here to Help: Remember, the team at Geospiza is here to support your efforts as your success is ultimately our success. So if you have any questions, problems or issues you would like to discuss, we encourage you to call us at (206) 633-4403, or to send an email to support@geospiza.com.

