

All implementations require careful planning. Wex Telematics provides you with a detailed Implementation Plan to help you manage and track progress during each stage. This article describes the components of the plan.

Roles and Responsibilities

You and your Wex Telematics representative will document role, name, title, phone, and e-mail for everyone involved in the project:

- Primary Customer Contact
- Fleet Manager
- Customer Installation Liaison
- Wex Telematics Sales Rep
- Wex Telematics Account Manager
- Wex Telematics Implementation Coordinator
- Wex Telematics Sales Engineer

Milestones

Next, you'll set tentative dates for major milestones, such as:

- | | |
|-----------------------------|-----------------------|
| • Kick-off call | • Full Implementation |
| • Contract Execution | • Q1 Account Review |
| • Installation | • Q2 Account Review |
| • Installation Verification | • Q3 Account Review |
| • Account Set-Up | • Q4 Account Review |
| • Training | • Yearly Review |
| • Integration | |

Implementation Schedule

Download Sample Implementation Schedule

The above implementation schedule includes the following parts:

1. Contract & Invoicing

Set contract execution date, record total device and asset counts, assign installation teams, introduce Account

Manager, define and validate invoicing and purchase order requirements.

2. Project Initiation

This phase includes a kick-off call to discuss goals and review implementation schedule. Define contacts and fleet managers in each department, and register key contacts for training courses. Set another meeting for installation coordination and finalize vehicle lists (details vary for self-install and professional install). Determine integration requirements and discuss available options.

3. Pre-Order (Applies to Paid Install Only)

Work with Account manager to prepare a vehicle list according to our preferred implementation template. Installation team provides recommendations on unit type and equipment. Two purchase orders are required for order to be shipped (one for installation/hardware, one for service).

4. Order

Estimate for device order must be approved. Help Center resources are available for [pre-training](#). Installation route is scheduled (typically 1.5-2 weeks). Fulfillment ships orders via standard FedEx 2 Day Air.

5. Installation

Complete and return the [Vehicle List](#). Remind site contacts of installation prior to arrival, so that when installer arrives, the installation can be completed as efficiently as possible. Installer registers devices after installation and verifies that devices are reporting. Proactive alerts and performance reports are set up in the portal.

6. Account Set Up

The account is set up according to specs defined in the kick-off meeting. Typical features include: [Hierarchies](#), [Vehicle Groups](#), [Vehicles](#), [Spreadsheet Upload](#), [Attributes](#), [Users](#), [Dashboards](#), [Drivers](#), [Scheduled Reports](#), [Alerts](#), and [Landmarks](#).

7. Training

Define a master software training schedule and identify the training participants who will learn how to use the portal (admin user). Additional remote (WebEx) training sessions can be scheduled for advanced training and special topics for users. (Recommend setting up a reoccurring training meeting until all users are trained.)

- **Administrator Training.** The initial session typically begins at the administrative level and focuses on establishing a list of users with varying degrees of account/software interface level access.
- **Non-Administrator Training.** Additional training for non-administrative users. WebEx meetings can be recorded for playback for any individuals who are unable to attend.
- **Self-Paced Training.** [Online training courses](#) are available for participants to take on their own time. Using recorded videos and a multiple-choice/interactive quiz, learners can assess how well they meet course objectives.

8. Integration

Provide an overview of **various integration options**. If **Fuel Card integration** is used, signed approval forms for data transmission are required.

9. Account Management

Account management's mission is to help you achieve maximum ROI with our solution through training, support assistance, and quarterly account reviews. We show creative ways to use the platform to affect positive change across your organization and turn goals into KPIs. We also provide device health analysis and **other deep dives**.



Note. Refer to the **alternate schedule** if you are transitioning from another GPS provider. Refer to the **ELD/HOS schedule** or the **ELD/HOS + GPS schedule** or if your implementation includes **Hours of Service**.