

## FSSI WIRELESS TRANSITION GUIDE

Whether your agency is switching to a new wireless vendor, or migrating to a new contract, the transition effort is an important project that involves planning and coordination among different business units to be accomplished successfully.

Our aim is to make your transition to the FSSI Wireless BPAs as smooth and efficient as possible. This guide was developed to help you plan and work more effectively with your contractors, your internal resources, as well as manage overall expectations.

Since no transition effort is exactly alike, we've developed a brief questionnaire (right table) to help gauge the complexity of your transition effort and the level of planning that's required.

To get started, review each question and mark in the blank space, the number of points for the most appropriate answer. Then summarize all points and place the final amount in the Total Score box.

Using the table below, compare you Total Score to get a sense for the complexity of your transition and the level of planning required for the project.

| If Total Score Is | The Level of Planning Your Organization May Need Is ...   |
|-------------------|---|
| 6 - 12            | <b>Limited:</b> a high-level plan should help manage your project                                     |
| 13 - 20           | <b>Moderate:</b> Having a formal Transition Plan from your vendor is recommended                      |
| 21 - 27           | <b>High:</b> a detailed project plan that includes the vendor Transition Plan is strongly recommended |

| Transition Questionnaire  |   |
|---|---|
| <b>Are you switching to or adding a new wireless vendor?</b>  |   |
| a. Yes  | 8 |
| b. No, we are staying with our existing vendor  | 2 |
| <b>How many total lines or devices will be ordered?</b>   |   |
| a. More than 2,000 units  | 4 |
| b. 500 to 2,000 units   | 2 |
| c. Less than 500 units  | 1 |
| <b>What describes the level of change in voice/data service plans?</b>                                |   |
| a. Many service plans will be need to change from our current plans (e.g., Unlimited to Pooled Plans) | 3 |
| b. Some service plans may change, but mostly stay the same  | 1 |
| c. Little change. Keeping the same/similar plans  | 0 |
| <b>Will service orders be placed by different groups?</b>   |   |
| a. Yes  | 3 |
| b. No, ordering done centrally (by single group)  | 1 |
| <b>Will any software or apps need to be installed with the devices?</b>                               |   |
| a. Yes  | 2 |
| b. No   | 0 |
| <b>Will the majority of users be replacing/upgrading their device?</b>                                |   |
| a. Yes  | 3 |
| b. No, most will keep their existing device   | 1 |
| <b>What is the expected timeframe to complete all ordering?</b>                                       |   |
| a. Less than 2 months   | 4 |
| b. Three to four months   | 2 |
| c. More than four months  | 1 |
| <b>Total Score</b>  |   |
| <input type="text" value=""/>   |   |

**Using the FSSI Wireless Transition Checklist** – After completing the questionnaire, use the *FSSI Wireless Transition Checklist* on the following pages to help you identify the priorities, key steps, tips, and resources appropriate for your specific project. For projects with a Total Score of twelve points or less, focus on Key Steps #1, #3, #6-8, and #12-13. For projects with a higher Total Score (e.g., 13 – 27), please review all steps in the Transition Checklist.

# FSSI WIRELESS TRANSITION CHECKLIST

## PLANNING AND PREPARATION

| Key Steps  | Considerations  | To Do's                  | Notes |
|--|---|--------------------------|-------|
| <b>1. Meet with your FSSI Wireless contractor as soon as possible after the Award</b>  | <ul style="list-style-type: none"> <li>Hold a kick-off meeting to review the contract, set goals, get your questions answered, receive basic training and review this checklist.</li> </ul>   | <input type="checkbox"/> |       |
|  | <ul style="list-style-type: none"> <li>Make sure you have all contact information for your vendor's account and customer care representatives.</li> </ul>   | <input type="checkbox"/> |       |
|  | <ul style="list-style-type: none"> <li>Ask if a dedicated team will be supporting your account for the transition effort and beyond</li> <li>Learn about the specific mobile device choices for users; including zero cost Service Enabled Devices (SEDs) as well as Open Market devices.</li> </ul>  | <input type="checkbox"/> |       |
|  | <ul style="list-style-type: none"> <li>Learn about the specific mobile device choices for users; including zero cost Service Enabled Devices (SEDs) as well as Open Market devices.</li> </ul>  | <input type="checkbox"/> |       |
| <b>2. Review the FSSI-W Transition Plan</b><br><br><i>Note: Complete the Transition Questionnaire to determine if the complexity of your situation requires a Transition Plan.</i> | <ul style="list-style-type: none"> <li>If your FSSI-W vendor has submitted a Transition Plan, review it and gain an understanding of the timetable, roles, and responsibilities. The Transition Plan is critical for coordinating, communicating and implementing your wireless transition.</li> </ul>  | <input type="checkbox"/> |       |
|  | <ul style="list-style-type: none"> <li>If your project requires a Transition Plan, and you haven't asked your vendor for one, request it as soon as possible from your Account team. All FSSI Wireless customers have the option to require their vendor to create a Transition Plan.</li> </ul>  | <input type="checkbox"/> |       |
|  | <ul style="list-style-type: none"> <li>Before approving the plan, ask yourself the following;                             <ul style="list-style-type: none"> <li>Are you comfortable with the approach and dates?</li> <li>Are the activities, roles, and responsibilities clear between the vendor and your organization?</li> </ul> </li> </ul> | <input type="checkbox"/> |       |
|  | <ul style="list-style-type: none"> <li>Review this FSSI-W Checklist and add activities not covered in the vendor's Transition Plan.<br/> <b>Tip!</b> A separate Project Plan (which incorporates the Transition Plan) may be necessary for a very large or complex project.</li> </ul>  | <input type="checkbox"/> |       |
| <b>3. Make communications a top priority</b>   | <ul style="list-style-type: none"> <li>Identify the different stakeholders and their needs; this includes agency management, IT department, ordering personnel, end users, etc.</li> </ul>  | <input type="checkbox"/> |       |
|  | <ul style="list-style-type: none"> <li>Determine the information/communication requirements of each group and the general timetable for reaching them.<br/> <b>Tip!</b> Partner with your contractor who has the experience and marketing collateral to support your communications effort.</li> </ul>  | <input type="checkbox"/> |       |
|  | <ul style="list-style-type: none"> <li>Note the Very Important People (VIPs) or "Power" users early on. Thoroughly know their particular needs and device preferences.<br/> <b>Tip!</b> Manage these users separately. Let your contractor know who/what their needs are.</li> </ul>  | <input type="checkbox"/> |       |

## FSSI WIRELESS TRANSITION CHECKLIST (Continued)

### SERVICE LINES / CELLULAR TELEPHONE NUMBERS (CTNs)

| Key Steps  | Considerations  | To Do's                  | Notes |
|--|---|--------------------------|-------|
| 4. Document your existing wireless inventory   | <ul style="list-style-type: none"> <li>Make sure your organization has a detailed inventory or a current monthly billing report of all active service lines including the account number, user name, cell telephone number, service plan, device type, and location.</li> </ul> | <input type="checkbox"/> |       |
|  | <ul style="list-style-type: none"> <li>Know your wireless inventory, it is the baseline for your FSSI Service Plan and future service orders.</li> </ul>  | <input type="checkbox"/> |       |
| 5. If switching to a different carrier, identify all Cell Telephone Numbers (CTNs) that will need to port over to the new vendor | <ul style="list-style-type: none"> <li>All wireless service plans—both voice and data service plans—have a unique CTN.</li> </ul>   | <input type="checkbox"/> |       |
|  | <ul style="list-style-type: none"> <li>Review your voice and data service plans and take advantage of the transition phase to disconnect service lines with zero usage (e.g., no voice or data usage for more than three months).</li> </ul>                                    | <input type="checkbox"/> |       |
|  | <ul style="list-style-type: none"> <li>Instead of removing CTNs altogether, another option is to change service plans to a lower cost metered service plan or emergency service plan.</li> </ul>  | <input type="checkbox"/> |       |
|  | <ul style="list-style-type: none"> <li>You may create a worksheet or use our FSSI Wireless Inventory Template (MS-Excel).</li> </ul>  | <input type="checkbox"/> |       |
|  | <p><i>Tip! When switching carriers, a best practice for data-only service plans, is to request from your new vendor that a new CTN be assigned. You then need to release the current data only CTN from your current vendor.</i></p>  | <input type="checkbox"/> |       |

### WIRELESS SERVICE ENABLED DEVICES (SEDs)

|  |  |                          |  |
|--|--|--------------------------|--|
| 6. Determine device selection approach                               | <ul style="list-style-type: none"> <li>Will device selection be centralized or determined by policy?</li> </ul>  | <input type="checkbox"/> |  |
|  | <ul style="list-style-type: none"> <li>Will users be given a choice on their SED(s) selection?</li> </ul>  | <input type="checkbox"/> |  |
|  | <ul style="list-style-type: none"> <li>Are these rules documented and approved by management?</li> </ul>   | <input type="checkbox"/> |  |
|  | <p><i>Tip! Make VIPs and "Power" users a top priority; they can be powerful advocates.</i></p>   | <input type="checkbox"/> |  |
| 7. Identify any special software or "apps" need to be pre-installed. | <ul style="list-style-type: none"> <li>Will mobile devices require installation of MDM/MAM software? If so, how is this being accomplished?</li> </ul>   | <input type="checkbox"/> |  |
|  | <ul style="list-style-type: none"> <li>Kitting is process of installing or removing software on pre-configure devices, prior to shipping them to users.</li> </ul>   | <input type="checkbox"/> |  |
|  | <ul style="list-style-type: none"> <li>Your carrier may provide kitting, which if used, can save much time and effort and improve user satisfaction. However, it may involve extra charges.</li> </ul>               | <input type="checkbox"/> |  |
|  | <p><i>Tip! The earlier you identify your requirements, the better chance your new carrier can accommodate this request. Kitting requires extras steps and may impact the project schedule if not considered.</i></p> | <input type="checkbox"/> |  |

## FSSI WIRELESS TRANSITION CHECKLIST (Continued)

### WIRELESS SERVICE ENABLED DEVICES (SEDs) Continued

| Key Steps   | Considerations   | To Do's                  | Notes |
|---|--|--------------------------|-------|
| 8. Identify any Government Furnished Equipment (GFE) or Bring Your Own Device (BYOD) users separately | <ul style="list-style-type: none"> <li>To avoid potentially stranded investment, make sure your carrier knows about your GFE and BYOD situation.</li> </ul>  | <input type="checkbox"/> |       |
|   | <ul style="list-style-type: none"> <li>Gather specific information, like the manufacturer and model of these devices. Special equipment may be needed to make them interoperable with the carrier's network—especially if you are switching to a different carrier.</li> </ul>   | <input type="checkbox"/> |       |
| 9. Manage older devices   | <ul style="list-style-type: none"> <li>Is there a plan for managing older devices, e.g., disposal or building stock inventory?</li> </ul>  | <input type="checkbox"/> |       |
|   | <ul style="list-style-type: none"> <li>Is there a process for swiping or clearing data on the old devices?</li> </ul>  | <input type="checkbox"/> |       |
|   | <p><i>Tip! Ask if your agency is receiving billing credits for older devices. If so, ask your vendor to explain the billing process for this.</i></p>  | <input type="checkbox"/> |       |
| <b>ACCOUNT SET UP AND SERVICE ORDER PLANNING</b>  |  |                          |       |
| 10. Review your billing accounts and pooling arrangements   | <ul style="list-style-type: none"> <li>Have changes occurred within work groups that require realigning billing accounts to new or different cost centers?</li> </ul>  | <input type="checkbox"/> |       |
|   | <ul style="list-style-type: none"> <li>Are you consolidating billing accounts to include a larger group of users to increase the pooling universe?</li> </ul>  | <input type="checkbox"/> |       |
|   | <ul style="list-style-type: none"> <li>FSSI Wireless allows "super-pooling" or pooling across different pooled service plans (for both voice and data service plans).</li> </ul> <p><i>Tip! Know your vendor's capabilities for managing account families/sub-accounts and how they work with pooled service plans.</i></p>  | <input type="checkbox"/> |       |
| 11. Provide a list of authorized personnel  | <ul style="list-style-type: none"> <li>Identify those in your organization who are authorized to place service orders against the Task Order, view accounts, and make changes to services.</li> </ul>  | <input type="checkbox"/> |       |
|   | <ul style="list-style-type: none"> <li>Make sure these individuals receive training and the guidelines for ordering.</li> </ul>  | <input type="checkbox"/> |       |
| 12. Complete an initial service ordering plan   | <ul style="list-style-type: none"> <li>Review your vendor's recommendations for the mix of service plans required given your current usage and plans.</li> <li>Understand your vendor's requirements and processes for accepting service orders.</li> </ul>  | <input type="checkbox"/> |       |
|   | <ul style="list-style-type: none"> <li>Document the guidelines and business rules in a service ordering plan, not only for your vendor, but for agency ordering personnel as well.</li> </ul>  | <input type="checkbox"/> |       |
|   | <ul style="list-style-type: none"> <li>In some cases, a User Guide may need to be developed to explain the program, features, choices, guidelines, and processes to users.</li> </ul> <p><i>Tip! FSSI Wireless vendors have business systems capable of implementing specific rules to help manage your service ordering objectives. Leverage their capabilities to save you time!</i></p> | <input type="checkbox"/> |       |

## FSSI WIRELESS TRANSITION CHECKLIST (Continued)

| ORDERING SERVICES   |  |                          |       |
|---|--|--------------------------|-------|
| Key Steps   | Considerations   | To Do's                  | Notes |
| <b>13. Place your service order(s)</b><br><br><i>Note: Consider using our Wireless Inventory/Ordering Template to help organize your service ordering activity on FSSI Wireless.</i>  | <ul style="list-style-type: none"> <li>Complete a Wireless Inventory worksheet (used as an attachment to the Service Order) that includes at a minimum, the User's Name, CTN, device type, device ship to location, and features.</li> <li>Prepare your service order(s) and submit the order to your FSSI Wireless vendor.<br/><b>Tip!</b> To avoid significant delays in your service orders, please make sure <u>you do not have duplicate telephone numbers (CTNs)</u>.</li> </ul>   | <input type="checkbox"/> |       |
|   |  | <input type="checkbox"/> |       |
| <b>14. If switching carriers, notify your existing carrier in writing that your organization is switching to a new vendor</b><br><br><i>Note: Your new carrier cannot not ship devices to users if there are any account issues (e.g., line is blocked). This will cause significant delays to the transition effort.</i> | <ul style="list-style-type: none"> <li>Request that your existing wireless vendor confirm that there are no conditions on the account that would prevent a porting of CTNs to another carrier. Ask for a receipt confirmation of your message.</li> <li>Your existing wireless vendor only recognizes <u>you</u> as the customer. Requests to port CTNs to another carrier must come from your agency, and not the new carrier.</li> <li>For <u>data-only service</u> plans, if planning to order new CTNs (versus porting existing CTNs), inform your prior vendor so they can release the data CTNs and avoid billing your account for unused services.</li> </ul> | <input type="checkbox"/> |       |
|   |  | <input type="checkbox"/> |       |
|   |  | <input type="checkbox"/> |       |
| OTHER CONSIDERATIONS  |  |                          |       |
| <b>15. Device/line activation must be completed within 15 days</b>  | <ul style="list-style-type: none"> <li>When porting CTNs to a new carrier, the industry standard for device/line activation is fifteen days from the receipt of the service order. If the user does not activate the device within that period, the CTN will be released.<br/><b>Tip!</b> If more time is needed, ask your vendor about the option for requesting a 30 day period instead.</li> </ul>  | <input type="checkbox"/> |       |
|   |  | <input type="checkbox"/> |       |
| <b>16. Working with a third-party TEMS provider</b>   | <ul style="list-style-type: none"> <li>Review your initial service ordering plan with your TEMS provider</li> <li>Make sure your TEMS provider has received training through your FSSI Wireless vendor.</li> <li>For larger projects, ask your TEMS to provide you with a formal Transition Plan.</li> <li>Finally, has your TEMS provider signed a letter of authorization for ordering with your agency?<br/><b>Note:</b> The FSSI W BPA does not accept orders from a third party without this authorization. Contact the FSSI Wireless program office for a sample letter.</li> </ul>  | <input type="checkbox"/> |       |
|   |  | <input type="checkbox"/> |       |
|   |  | <input type="checkbox"/> |       |
|   |  | <input type="checkbox"/> |       |
| <b>17. Post Transition Follow-up</b>  | <ul style="list-style-type: none"> <li>Make sure that any remaining service lines are disconnected.</li> </ul>   | <input type="checkbox"/> |       |