

Alma Specto Implementation Methodology

Executive Summary

This document outlines Clarivate's structured approach for implementing Alma Specto solution. It details project phases, team roles, timelines, training, and best practices to ensure a successful and sustainable deployment for your library.

1. Our Implementation Methodology

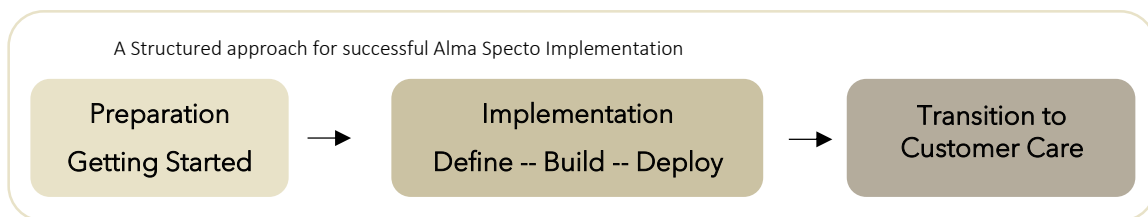
Clarivate's methodology is based on proven best practices and collaborative partnership. Our experienced project manager works closely with your team to ensure alignment on scope, roles, and timelines, allowing your staff to focus on institutional priorities while we manage technical execution.

Key Features:

- **A Defined Implementation Timeline:** 2-4 months depends on project scope; Two months is typical duration for existing Alma customer that doesn't have Alma Digital. Data migration services or Preservation implementation will extend the project duration.
- **Collaborative Partnership:** Regular checkpoints for accountability and quality

2. Project Phases

Our implementation methodology leverages best practices and years of professional experience to provide a structured, repeatable process that manages expectations and ensures success. The typical project implementation is structured into clear phases, each with defined activities and deliverables.



2a. Getting Started: Project Preparation

Upon signing the contract, you receive a comprehensive preparation welcome package containing guides, recommended recorded training sessions, and technical documentation for library and IT staff.

You will also be asked to fill in an onboarding questionnaire. Clarivate will conduct an internal review based on your answers, to ensure our implementation team understands your institutional goals, requirements, and project scope. During this preparation period, both teams identify stakeholders and form project teams. We recommend using this time to review your existing workflows and data.

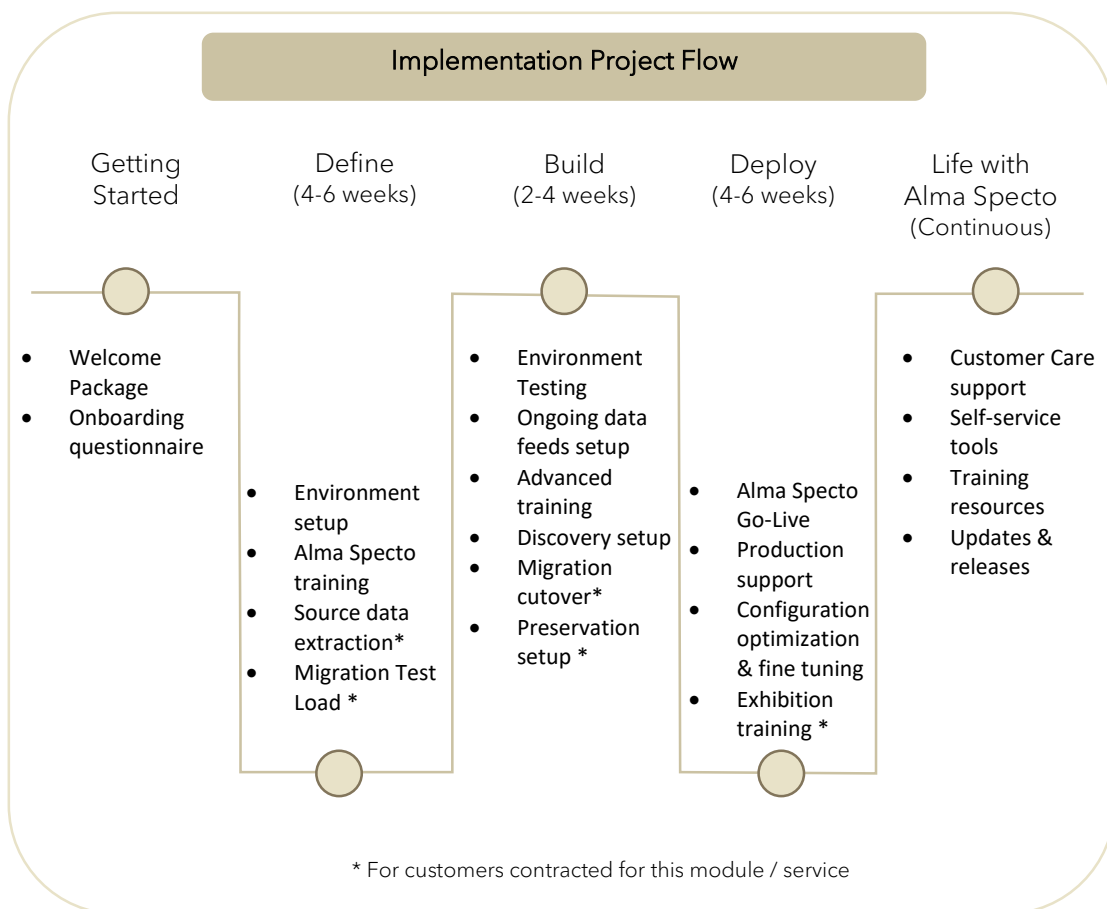
Your assigned Clarivate project manager then coordinates a kick off meeting with your project lead to formally begin implementation.

Key Activities:

- Welcome package with guides and recorded sessions
- Internal review to understand your goals and requirements
- Complete and review of the onboarding questionnaire
- Stakeholder identification and project team formation
- Workflow and data review by your institution
- Project kick-off coordinated by your Clarivate project manager

2b. Implementation

Clarivate implementation team pairs with your institutional project team throughout the process. Regular project status meetings ensure progress tracking and accuracy at every stage



Define Phase

The Define phase is the requirements-gathering stage, during which we translate institutional needs into technical specifications. Your staff completes essential training, participates in Q&A sessions, and provides workflow requirements and, where applicable, migration inputs. In parallel, the Clarivate project team initiates environment configuration and performs an initial test data-migration load. If migration from a source system is included in scope, the source data extract and migration mapping are completed during this phase.

Kickoff & Planning

- Project manager establishes project plan and milestones
- Teams agree on Go-Live date and implementation timeline

Environment & Training

- Specto activation on both Production and Sandbox
- Customer completes Alma Specto Essentials Training (eLearning videos) followed by Q&A sessions

Data & Configuration

- Customer provides configuration inputs
- Clarivate configures the Specto environment based on your requirements
- Customer extracts data from source systems *
- Test data migration performed *

* When in scope

Build Phase

The Build phase involves testing configured systems with your data against real-world scenarios and institutional workflows. This includes comprehensive training and environment testing to ensure operational readiness.

Testing & Functionality Setup

- Specto environment access provided for functionality review
- Ongoing data feeds identified and configured
- Functional calls between implementation teams
- Exhibition initial setup *
- Preservation initial setup *
- Customer data testing of migrated data *

Final Preparations for Go Live

- Advanced training conducted
- Source systems frozen for cutover *
- Final migration cutover performed *

* When in scope

Deploy Phase

The Deploy phase brings Alma Specto to life in production, delivering a confident go-live experience and a smooth transition into day-to-day operations. With hands-on guidance from our dedicated implementation team, we proactively monitor and resolve issues and fine-tune the configuration. The phase concludes with a handoff to the Clarivate Customer Care team and formal project closure.

Go-Live & Support

- Go Live with Alma Specto
- Production launch with dedicated implementation team support
- Regular status calls to address any issues and system optimization
- Transition to Clarivate Customer Care team
- Project completion

2c. Life with Alma Specto

Your relationship with Clarivate extends well beyond Go-Live. We are committed to ensuring your continued success with Alma Specto solution.

Our Customer Support team provides comprehensive assistance for technical issues and system optimization. This includes robust self-service resources and direct support through our case management system, accessible via the Clarivate customer portal.

Your investment is protected through ongoing training resources, system updates, and strategic guidance to support your institution's evolving needs.

3. Roles and Responsibilities

A successful Alma Specto implementation depends on strong collaboration between Clarivate and your library's project team. Below is a summary of each team's core roles and responsibilities.

Project Team Overview

Team	Primary Role	Key Responsibilities
Clarivate	Guide and support successful implementation	Project management, configuration, data migration, training, and technical support
Customer	Lead local adoption and internal coordination	Project oversight, data preparation, functional review, training, and technical integration

Clarivate Project Roles

Role	Key Responsibilities
Project Manager	Oversee project plan, schedule, risks, and communication; coordinate all activities
Implementation Consultant	Analyse requirements, apply configuration, provide implementation support, consult on workflows and training
Data Migration Consultant	Manage data migration from legacy systems

Customer Project Roles

Role	Key Responsibilities
Project Lead	Manage internal team, coordinate with Clarivate, track progress, escalate issues, report status
Functional Experts	Advise on business processes, conduct functional reviews, participate in testing and training
Training Coordinator	Train library staff, adapt training materials, support ongoing learning
Technical/Integration Lead	Provide technical expertise, support integrations, assist with testing
System Administrator	Gain system proficiency, manage day-to-day operations, open support cases post-launch

4. Customer Education

Training is strategically embedded across every phase of the implementation lifecycle and continues well beyond Go-Live. This ensures your team builds and sustains the expertise needed for long-term success and system optimization. Clarivate provides comprehensive training and targeted workflow consulting to your core project team over the course of the project.

Learning Resources

- **Self-Paced Training Modules:** micro-tutorials and user guides available anytime via the [Customer Knowledge Center](#)
- **In-Product Help & Documentation:** Extensive, searchable product documentation accessible both on the Knowledge Centre and directly within the application

• Ongoing Education

- **Release Webinars & Highlight Videos:** Timely updates on new features and enhancements, helping your team stay current
- **Live Webinars:** Complimentary, instructor-led sessions covering essential topics and best practices
- **[Premium Workshops:](#)** Intensive, small group workshops offering hands-on experience and deeper dives into advanced functionality

This structured approach ensures your staff maintain expertise and can leverage new features as your system evolves.

Implementation Project Details

Below are additional details of the Clarivate implementation project.

General Project Activities Listed below are typical project activities to help a customer plan and prepare for their Clarivate project

Onboarding	Identify project stakeholders and define project teams (organizational planning)	V	
	Review existing workflows and data	V	
	Specto activation on sandbox		V
	Alma Specto training	V	
	Complete and review onboarding questionnaire	V	V
	Start preparing data for migration to Alma Specto	V	
Define phase	Kickoff meeting	V	V
	Project scope, schedule, and communication plan reviewed and agreed upon	V	V
	Alma Specto essential training	V	
	Configuration and workflow inputs provided	V	
	Migration inputs provided *	V	
	Alma Specto environment initial setup		V
	Test load data migration		V
	Alma Specto environment delivery		V
Build Phase	Environment and data testing & feedback	V	
	Customer verification of loaded data	V	
	Functional testing, report issues and amend	V	V

	Configure ongoing data feeds	V	
	Alma Specto advanced training	V	
	Discovery setup	V	V
	Exhibition initial setup *		V
	Preservation initial setup *		V
	Freeze of customer's source systems followed by Clarivate performing a final cutover migration*	V	
	Final cutover data load*		V
Deploy Phase	Go Live - Specto is operational	V	
	Configuration optimization and fine-tuning	V	V
	Transition to Clarivate Customer Care team	V	V
	Project closure	V	V

*When the service / module is in scope of the project