Dazychain White Paper
Change Management Fundamentals

Implementing software is challenging for busy teams with high volumes of complex matters and very little spare time. As part of our service, the Dazychain team guides and supports you through the implementation and change management processes to ensure the successful adoption of Dazychain.

Dazychain implementation is generally completed within 8- 10 hours meeting time. Based on availability, this typically occurs over a period of 2 – 3 weeks.

After launch, we continue to assist your change management by providing established check-ins, workshops and on-call support. Following is a description of the Dazychain implementation approach.

1	IT Security and compliance meeting
2	Business discovery session
3	Template check-in
4	Training and change management
5	Go-live

1

IT requirements session

Time requirement: 1 hour

Data and information security is a critical consideration when adopting new software, as protecting sensitive data and ensuring compliance with industry standards is a top priority. It is not uncommon for IT teams to require an in-depth review and approval process before adopting new software solutions. We work directly with your IT team to ensure compliance.

Review of IT materials
Documentation of Dazychain's security protocols and data protection measures. Details include secure data in transit and at rest, encryption practices, user authentication methods, data access management, and copy of ISO 27001 and SOC2 certifications.

Meetings with IT team
We are available to meet with your IT team to directly address any questions or concerns that arise during the review process or to discuss security in greater detail.

Single Sign-On
If utilizing Single Sign-On (SSO) to streamline user authentication and improve security, we collaborate with your IT team to configure the integration, ensuring Dazychain seamlessly connects to your organization's authentication system.

Answering security questionnaires
Security-related questionnaires provided by your IT team are answered thoroughly and accurately. Providing an understand how Dazychain handles data security, privacy, and risk management.

2

Business requirements session

Time requirement: 3 hours

In our initial meeting, we discuss your needs, requirements, and overall strategy. We'll also outline how we collaborate throughout the project, covering the following key areas:

- Project plan
- Priorities and general requirements
- Review of your organization's current structure, strategy, and workflows
- Our approach to implementation and change management
- Project timeline, structure, and management

Next, we'll dive deeper into your existing processes to tailor Dazychain to your specific needs, including:

- Current workflows and processes
- Preferred workflows and improvements
- Matter and document types
- Key data points for collection and reporting
- Matter and document automation needs
- Document templates
- User roles, groups, and access security settings

3

Template check-in

Time requirement: 1 hour

In our third meeting, we focus on reviewing, demonstrating, and finalizing the configuration of your Dazychain system to ensure it is tailored to meet your specific needs and business requirements. Meeting agenda includes:

- **Review and demonstrate the custom-configured Dazychain templates**
  We begin by reviewing the custom templates developed for your organization. During this demonstration, you see how the templates work in real-time and ensure they meet your expectations.

- **Update any configuration changes**
  Based on your feedback during the demonstration, we address any changes or refinements required. This may include adjustments to workflows, data fields, or user permissions to better suit your operational requirements. We ensure that any necessary configuration updates are made promptly to ensure the system reflects your desired setup.

- **Sign-off on system configuration**
  Following the review and implementation of updates, we will seek your approval to finalize the configuration. This 'sign-off' confirms that the system is set up according to your specifications and is ready for the next phase of implementation.

- **Training and Launch planning**
  In this final part of the meeting, we shift focus to preparing for the Dazychain rollout. This involves discussing the training requirements for your team to ensure they are fully prepared to use the system effectively and any final requirements needed prior to launch.

By the end of this meeting, Dazychain is fully configured and ready for deployment, with a clear plan for training and a well-defined roadmap for the system's launch.

4 Training

Time requirement: 3 hours

Our training sessions provide you and your team with the knowledge and skills necessary to effectively use Dazychain. Sessions will cover:

- **Navigation:** Users are guided through the software's interface, familiarizing them with the layout, menus, and dashboards. This step helps users understand where to find key functionalities such as matter creation, document management, and task tracking.

- **Creating and managing matters:** learn how to create new matters, enter relevant data, and track progress. This includes setting due dates, assigning tasks, and updating the matter status with their own current matter.

- **Document management:** Learn how to upload, organize, and share documents within the software. Users learn to track and categorize files, ensure compliance, and maintain version control for legal documents.

- **Deliverable management:** Learn how to set up deliverables/tasks, due dates, and reminders related to each matter. This ensures critical activities are tracked, and users stay on top of their responsibilities.

- **Reporting and analytics:** Users are trained to generate and interpret reports related to matters, such as status updates, risk summaries, or assignment. This helps teams monitor performance and make data-driven decisions.

- **Collaboration features:** Learn how to collaborate with team members, clients, and stakeholders within the platform. This includes sharing updates, communicating securely, and ensuring everyone is aligned on the status of the matter.

- **Best practices:** The session concludes with a discussion of best practices to maximize the software's potential, along with ongoing support check-ins determined.

5 Dazychain go-live

Follow-up and support are essential parts of our services to ensure that you get the most value from your Dazychain account after it goes live. In this phase, we collaborate with you to establish a clear plan for ongoing support and assistance tailored to your needs.

- **Schedule post-implementation review:** We schedule post-implementation reviews to assess how the team is adopting Dazychain. The reviews help evaluate if the system meets your business needs, identify any challenges or pain points, and gather feedback on the overall user experience.

- **Establish a schedule for check-in and support meetings:** We work with you to schedule periodic meetings with your dedicated Dazychain account manager. These check-ins enable us to stay updated on your progress, address any new challenges, provide guidance on advanced features, and ensure that your account is configured to get the most value.

- **Additional training and support:** As your team becomes more familiar with Dazychain, there may be additional training needs as new features are introduced, team members change, or your business processes evolve. If you require additional support—whether for troubleshooting, feature clarification, or best practices, our support team will be readily available to assist.

Our goal is to ensure that your team has the resources, guidance, and support necessary for the effective use of Dazychain.