

Implementation Guide

A practical guide to implementing Fulcrum. This resource outlines the roles, data strategy, phases, and best practices that drive a successful launch and long-term adoption.

Resource Requirements

Who we need from you.

A successful implementation requires a committed team on your side. Below are the key roles required.

Role	Responsibility	Est. Time Commitment
Executive Sponsor	Strategic alignment, removing internal roadblocks, drives accountability	🕒 2 Hours / Month
Project Lead	The primary point of contact. Owns the timeline, coordinates internal teams, and drives accountability.	🕒 4-6 Hours / Week
Data Lead	Responsible for exporting legacy data and validating Fulcrum imports.	🕒 2+ Hours / Week (Phase 2 only)
Functional Leads	Ops Manager, Department heads (Estimating, Sales, Purchasing, Shop Floor, Warehouse, Accounting) who attend specific sessions to validate their workflows.	🕒 1-2 Hours / Week (as needed)

🕒 Note on Time Commitment

The time required for implementation will vary based on your team's role and the project's current stage. Anticipate that the necessary time commitment will increase as your team advances through each project phase.

Data Migration Strategy

Your current system determines how data is extracted, what formats are required, and how much validation is needed. **Refer to the Platform-Specific Migration Path** for more specifics.

What to Expect, Regardless of System

Your Launch Manager will help you import production data from your existing system if possible.

Commonly Migrated Data

Bills of Materials

Items & Assembly Data

Customers & Vendors*

Routings / Operations

Inventory & Inventory Locations

Sales Pricing & Current Vendor Pricing



Collaboration Expectations:

Data migration is a partnership. While Fulcrum assists with extracting and formatting the data, we rely on your team's expertise to translate, clean, and sort through unnecessary data that will clutter the system. Use this as an opportunity to reset and start Fulcrum with clean, accurate data.

** Note: Customer and Vendor exports from Accounting systems are typically preferred as it will be critical that these records match with your customer and vendor data within Fulcrum.*

Environments

Sandbox Sites

Available upon request for testing data imports without consequences.



Production Resets

Data entered into your primary Fulcrum site can be wiped or reset as often as needed up until Go-Live. This allows us to iterate and perfect your setup.

Requirements

IT Coordination

Set a plan with your IT team or technical lead to gather this information before your kickoff meeting.

Time Commitment

Please expect this to require at least 2 hours per week from your Data Lead / SME to ensure accuracy during Implementation Phase 2: Build.

Best Practices

The biggest indicators of a smooth, successful launch.



Meet Intentionally + Often

Avoid relying on weekly Launch calls for momentum. Meet with your team, internally, on a regular cadence to keep tasks and forward progress top of mind.



Document Current Process

Having a deep understanding of your current workflow, process requirements, roles and responsibilities is going to allow your Launch Manager to hit the ground running. Spend time documenting this with your team before the "Build" phase.



Design the "Future State"

Do not customize Fulcrum to mimic your old software. Adapt your data, workflows, and communication based on Fulcrum's best practices and where you want the business to go.



Clean Data First

Spend time scrubbing, removing duplicates, archiving stale data before migrating.



Extreme Ownership

Leadership should take a strong and consistent approach to staying organized, completing action items, and using the product week over week — a full-steam-ahead approach!



Create Buy In, Early

Instill awareness and excitement, from the beginning, across your business for all eventual users. Emphasize the value Fulcrum will bring to their day-to-day.



Leverage Resources

Take advantage of the many resources your Launch Manager provides you — Launch Pad, Loom, Scribe, Figma, Tribe — plenty of ways to get the information you're looking for.

Change Management & Culture

Successful implementation isn't just about data and software — it's about people. Preparing your team for change is the single biggest predictor of long-term success.

🎯 Leadership Alignment

Your team will look to leadership to gauge how serious this change is. An Executive Sponsor must be visible, vocal, and active throughout the project.

Key Actions:

- Articulate the "Why" clearly to the entire company.
- Participate in key milestone reviews, not just the kickoff.
- Remove roadblocks for the implementation team.

💬 Communication Strategy

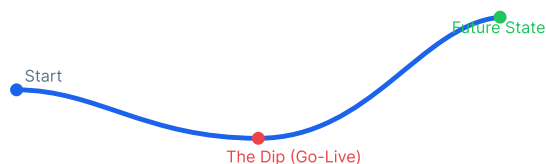
Silence breeds anxiety. Keep the shop floor informed about what is coming, when it is coming, and how it benefits them personally.

Talking Points:

- "This will eliminate the paperwork you hate filling out."
- "We are investing in modern tools to make your job easier."
- "Your experience is needed to build this right."

💡 The "J-Curve" of Change

Expect a temporary dip in productivity immediately after Go-Live. This is normal as people build muscle memory with the new system.



** Plan for reduced shop capacity during the first week of live production.*

♥ Psychological Safety

Team members may fear that automation puts their jobs at risk, or that they won't be able to learn the new tech. Address these fears head-on.

Empowerment Strategy:

- Identify "Super Users" early and give them extra training. They'll help the rest of the team.
- Celebrate small wins publicly during implementation.
- Make it safe to ask "stupid questions" without judgement.

Onsite Training

Onsite visits are **not required**, but some companies choose to include in-person sessions.



Onsite visits can be coordinated directly with your Launch Manager and typically last **two to three days**, depending on your specific goals. While these visits most often occur during the 'Launch' phase to facilitate wider team training, an earlier visit can be valuable for assessing organizational complexity and tailoring the Fulcrum setup.



Flexible Timing

Can be scheduled for assessment early on, or training near Go-Live.



Strategic Agenda

We collaborate to establish a clear agenda beforehand to maximize our time together.

Ongoing Support

Free, unlimited support for life after you go live.



Dedicated Account Manager

Your personal advocate for strategy, new features, and ensuring long-term ROI.



Unlimited Support

Our support team is available via email to help with any questions you have, at no extra cost.



Fulcrum Tribe

Join our active community of manufacturers to see weekly product updates, share tips, tricks, and best practices with peers.



Included Forever

We don't charge for support or hourly help. Support is included with your subscription for life.