

## Leveraging Custom Training & Consulting Services

***Whether you're onboarding with improveit 360 and need more support outside of our standard training, or you've been using the system for years but want to revamp your processes, we have the resources available to help ensure you are using improveit 360 effectively. Below, you'll find information on the comprehensive training and professional consulting services we offer.***

### Onboarding Pre Go-Live Support

In larger organizations, additional support from our team may be needed during Onboarding. If your teams are segmented and each Department Manager at your organization would like to meet with our Solutions Consultant for configuration and recommendations, we suggest adding Pre Go-Live Support to your Onboarding Project plan. This allows our team to dive into each functional area of your business and provide a more customized consultative solution for each of your department's needs.

As an example, you have a Call Center operating today. It may be necessary to change the call center's day-to-day operations. Having time with our Solutions Consultant, dedicated to identifying and training on any new standard operating procedures in the Call Center will help assure a smooth transition.



### Post Go-Live Support

During the initial days of your live implementation, your team may have additional questions that were not covered during onboarding. Our Post Go-Live Support and Training service assures you have the support and training you need in those first critical days after Go Live. You can reserve a member of our team in half-day or full-day increments.

As an example, during Go Live your department managers may need to have time dedicated to procedural changes that affect each functional area of your organization.

### Advanced Feature Implementation

When customers Go-Live with improveit 360, they sometimes have not had time, during the Onboarding phase to implement all the features they would ultimately like to utilize. At any point after Go-Live, our team can work with you to implement improveit 360's native features and out-of-the-box functionality.

Not using Email automation, but want to start? Our team is happy to help you configure and turn on features, allowing your business to make the most of your improveit 360 software.

Here are a few examples: Report and Dashboard automation, Time Block Scheduling, Call Campaigns and Call Queue, Email Automation, Project Templates and Production Grid... and so much more!





## System Audit and Consulting

Is there a wild and unruly business process you'd like to wrangle into submission? Our team will meet with you to understand how the process is being tracked now and make recommendations on how improveit 360 can help tame the process, get your teams on the same page, and assure consistent system usage and better reporting.

After the consultation/discovery meeting, a full Scope of Work will be prepared. Following the meeting, improveit 360's team will deliver an estimate for implementing any of improveit 360's Advanced Service recommendations. 2-hour minimum discovery/consultation call (some topics may require 3-4 hours).

*\*Hours are an estimation based on average customer use of the system and may vary.*

Topics Include (but are not limited to):

### Data Entry – 3 hours\*

- Data Integrity Review
- Lead Flow – Document Life-of-a-Lead as it relates to client's business processes
- Document any gaps in information gathering

### Users & Permissions – 2 hours\*

- Profiles
- Permission Sets
- Roles
- Calendar Sharing
- Record Security recommendations

### Field Auditing – 3 hours\*

- Field Usage and Integrity of data collected
- Page Layouts – fields on page not being used
- Field Level Security for specific Profiles

### Reporting & List Views – 2-3 hours\*

- Run Usage Report on Reports
- Review Folder Structure/User access

- Review Profile Permissions on Create/Run reports
- Clean-up and Restrict List Views
  - Restrict ability to create list views for everyone

### Customizations & Automations – 3-4 hours\*

- Validation Rules – Document by object
- Workflow Rules – Document automations by object
  - List emails by object (email name)
- Processes – Document by object. Recommend appropriate configuration to make more efficient

### Third-party Integrations – 2 hours\*

- Current Integrations – review current functionality and possible enhancements (if available)
- Q&A Consultation on Potential Integration – Document any recommendations

If you would like more information on the improveit 360 Custom Training & Consulting service, be sure to contact your Relationship Manager or Project Manager for more information.

