

# Customer Success

## Implementation Packages

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## Implementation Packages

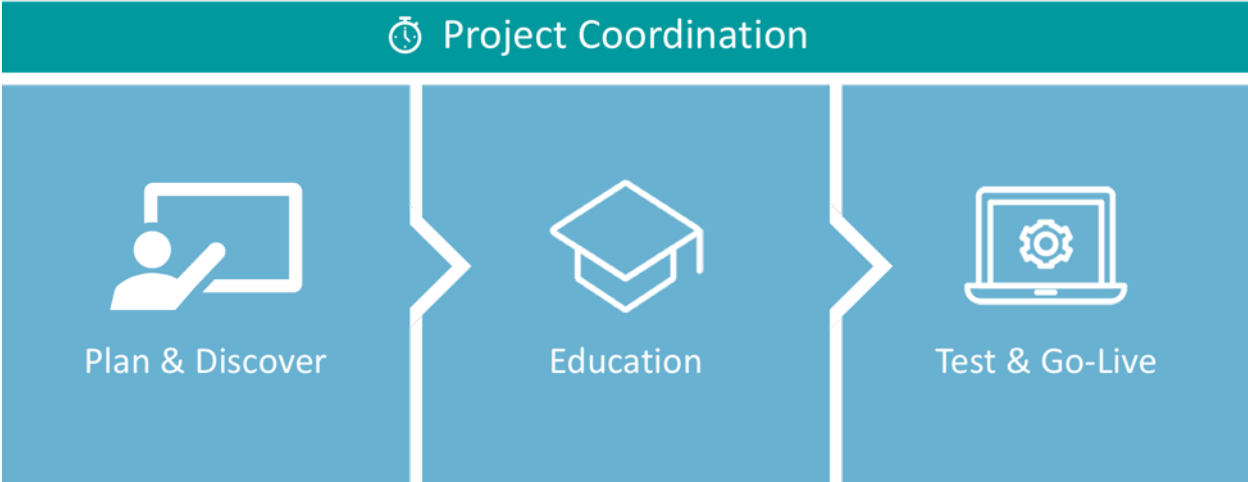
For your implementation, the Shiftboard Customer Success team will provide a defined set of onboarding services based on the Success Package purchased in your order. Shiftboard offers three types of implementation packages:

- Implementation Package 1 (Enabled Success)
- Implementation Package 2 (Guided Success)
- Other implementations will have separate statements of work governing services scope.

For Guided and Enabled Success packages, this document defines the scope of those services, and the associated set of customer tasks that your team will typically engage on.

# Package 1: Enabled Success Implementation

## Overview



Enabled Success onboarding is an education focused success package, that comprehensively trains your team on the Shiftboard solution, and additionally provides you a best practice initial design for your industry and processes. We target a timeframe of six to eight weeks from kick-off to Go-Live. Additionally we will provide your team support as they test the system and go live. Enabled Success includes three phases to complete successful Shiftboard onboarding:

- **Plan and Discover:** In this phase we agree a timeline that drives toward an agreed go-live date, and conduct profile-based discovery to understand your as-is processes and requirements that Shiftboard will use to create a recommended baseline solution for you
- **Education:** Based on your use-case, we provide up to three specific training classes on Shiftboard features, including Fundamentals (People and Teams), Scheduling Tools, and Other Tools. Training classes are held remotely, however onsite training is an option for an additional charge.
- **Test and Go-Live Support:** Once your team is trained in the Shiftboard solution, Shiftboard will then run two support sessions to further train and answer questions as you prepare for solution cutover and deployment.

## Phase 1 - Plan and Discover

### Activity – Project Planning

#### **Customer Success Manager provides:**

Presents the kick-off meeting with your project team that explains the onboarding process and agrees timelines through to go-live. Provides a standard work plan that drives the onboarding and defines the activities your team will be involved with during each phase.

#### **Your role in this activity:**

Your team, including project sponsor and project manager, should attend the kick-off meeting. At that meeting we will ask the project sponsor to articulate the business vision and goals for Shiftboard for your organization, so the joint team understands these priorities during onboarding.

Additionally, your team should provide input to the agreed timeline and dates that reflects both your desired go-live date, and everyone's availability to complete their activities as defined in this document. Your assigned project manager should plan out and allocate this work across your team.

### Activity – Requirements Discovery

#### **Customer Success Manager provides:**

Early in the onboarding process we will conduct an in-depth requirements and as-is process review with your team, both to understand your current workforce management process as well as your current pain points and future business goals. Following the discovery, your CSM will create a baseline Shiftboard solution design that reflects those requirements, as well as recommended best practices for your industry and use cases. The solution baseline will also include some sample 'real-life' workers and shifts from data you supply to us.

#### **Your role in this activity:**

We will ask your team to complete a short requirements survey as input to this process. Included within that survey are about 40 questions on your workforce management business processes that should only require brief (1 or 2 sentence) answers. The survey also has a section for you to provide us data on your workers and standard shifts. You can provide us either all, or a representative set, of this data. After we receive and review your survey we will ask you to participate in a requirements and as-is process review to fully understand your business needs.

## Activity – Initial Data Conversion

### **Customer Success Manager provides:**

Auto-loading of critical business data into Shiftboard. Your CSM will provide you spreadsheets to collect the data and run the validation and load scripts to enter them. We will perform one Person upload for each type (Profile) of individual you track. Additionally, if required we can auto-load Availability information and control data such as Clients and Locations.

### **Your role in this activity:**

Your team's role will be to compile the data in the correct format for a one-time load in each category, and to validate the correctness and completeness of the data loaded. Separately you can use Shiftboard's established bulk upload capabilities to auto-load schedules into the system if desired.

## Phase 2 – Education

Prior to taking instructor-led training we will ask your project team to review "Introduction to Navigation" videos so that you are familiar with Shiftboard application basics. The subsequent instructor-led training provided will be a blend of demonstration and hands-on practice for your team.

Following the training your team will take ownership of the current Shiftboard solution design and refine it further to your business needs as required.

## Activity – Fundamentals of Shiftboard

### **Customer Success Manager provides:**

Detailed training on People and Workgroups using the baseline Shiftboard solution design created in the prior phase. We will train you on application use and how to change application settings.

### **Your role in this activity:**

Your team should review "Introduction to Navigation" videos and then participate in each training relevant to their role, and complete the exercises assigned within the sessions.

## Activity – Scheduling Tools

### **Customer Success Manager provides:**

Detailed training on Scheduling Tools using the baseline Shiftboard solution design created in the prior phase. We will train you on application use and how to change application settings.

### **Your role in this activity:**

Your team should review "Introduction to Navigation" videos and then participate in each training relevant to their role, and complete the exercises assigned within the sessions.

## Activity – Other Tools

### **Customer Success Manager provides:**

Detailed training on Other Tools using the baseline Shiftboard solution design created in the prior phase. We will train you on application use and how to change application settings.

### **Your role in this activity:**

Your team should review “Introduction to Navigation” videos and then participate in each training relevant to their role, and complete the exercises assigned within the sessions.

## Activity – Integration Overview

### **Customer Success Manager provides:**

Throughout the training sessions your CSM will also provide you an overview of Shiftboard’s integration capabilities, including bulk upload and download, Drop Point batch integration capabilities, and our guide to API calls for real-time integrations.

### **Your role in this activity:**

Participate in the training and take ownership of the current design to refine further to your business needs as required.

## Phase 3 – Test and Go-Live Support

Typically the biggest risk in your onboarding is user adoption. User adoption risk can be mitigated through properly addressing change management internally. Such change management communication should promote the benefits of a scheduling solution within a mobile app that empowers the employee to make real-time adjustments to availability, PTO and picking up additional shifts when available.

## Activity – Testing Readiness

### **Customer Success Manager provides:**

Your CSM will run **one** Testing Readiness session to support your testing and adoption of the Shiftboard solution and answer any questions you have and confirm all features that you need are enabled. Following the session your CSM will support your testing efforts by responding to and resolving testing issues, for up to 3 weeks following the Testing Readiness session.

### **Your role in this activity:**

Your team will attend the Testing Readiness session and perform the testing you deem necessary to prove out the solution for your business. When you need support on testing questions you will log test issues for your CSM to respond to. Your team will own the Shiftboard design over this period.



## Activity – Go-Live Readiness

### **Customer Success Manager provides:**

As you approach Go-Live your CSM will run Go-Live Readiness session with your team. At Go-Live your CSM will work with you to execute agreed cutover steps; and following cutover your CSM will continue to support you directly (hyper-care) for one scheduling period, or a maximum of 4 weeks. Following that period your CSM will formally transition you to Shiftboard support, and we can jointly celebrate a successfully completed project!

### **Your role in this activity:**

Your team will attend the Go-Live Readiness session. You will work with the CSM on assigned tasks for the cutover along with any end-user training required, and log issues for any support required or questions your team has. After the hyper-care period (one scheduling period) you will formally be transitioned to Shiftboard support for your ongoing production support questions.

## Additional Scope

The following are not included in the base Enabled Success package but can be scoped additionally:

- Design / Testing sessions for additional scheduling workgroups within your organization
- Additional interfaces vs. above scope
- Additional data conversions vs. above scope
- Training users beyond your immediate project team
- Custom reports beyond Shiftboard web reporting capabilities
- Deployment cutovers for additional scheduling workgroups within your organization
- Training sessions post Go-Live

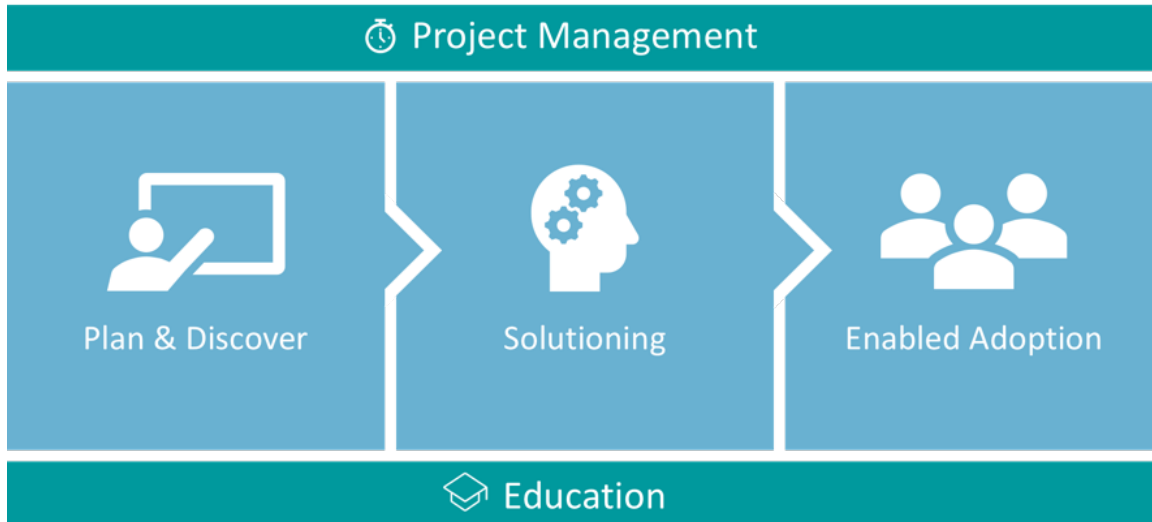
## Team Commitment

Shiftboard is committed to providing all customers with an industry-leading onboarding program. We dedicate significant resources to your account to complete the Implementation process in a timely and efficient manner. However, due to resource constraints and to best serve all customers, we are unable to provide unlimited team access. All training and support in this package will expire 90 days from contract execution. Additional services are available after this time for additional cost, please contact your Account Manager for additional details.



## Package 2: Guided Success Implementation

### Overview



Guided Success onboarding assures a rapid, quality Shiftboard deployment that contains best practices design and ensures a fully adopted solution. Guided Success provides both an implementation methodology and toolset to make your onboarding experience smooth and effective. We target a timeframe of 8-12 weeks from kick-off to Go-Live. Guided Success includes three phases to a successful Shiftboard onboarding:

- **Plan and Discover:** In this phase, we create an accountable timeline that drives toward an agreed go-live date, and conduct profile-based discovery to understand your as-is processes and requirements that Shiftboard will use to create a recommended baseline solution for you.
- **Solutioning:** This phase commences with agile sprints to present, review and further refine the baseline solution. Following design agreement, Shiftboard will then present a testing workshop and predefined test guides to help you fast-track testing and acceptance of the solution.
- **Enabled Adoption:** Once your solution has been tested by your core team, Shiftboard can then assist you with change management and user adoption by your scheduling managers and employees. We provide train-trainer education for your core team to complete the rollout, educational collateral such as videos to assist with certain tasks and work with you preparing for and conducting a go-live.

In support of these three phases, Guided Success also provides project management services that includes initial workplan creation and weekly progress reports against timeline and goals. Additionally, we provide several specific training classes on Shiftboard features as the onboarding progresses.

## Phase 1 - Plan and Discover

### Activity – Project Planning

#### **Customer Success Manager provides:**

Presents the kick-off meeting with your project team that explains the onboarding process and agrees timelines through to go-live. Provision of an online project workspace including a custom work plan that drives the onboarding and defines the activities your team will be involved with during each phase. The online project workspace will be used track task completion and issue resolution in the course of the project, as well as provide status updates.

#### **Your role in this activity:**

Your team, including project sponsor and project manager, should attend the kick-off meeting. At that meeting we will ask the project sponsor to articulate the business vision and goals for Shiftboard for your organization, so the joint team understands these priorities during onboarding.

Additionally, your team should provide input to the agreed timeline and dates that reflects both your desired go-live date, and everyone's availability to complete their activities as defined in this document. Your assigned project manager should plan out and allocate this work across your team.

### Activity – Requirements Discovery

#### **Customer Success Manager provides:**

Early in the onboarding process we will conduct an in-depth requirements and as-is process review with your team, both to understand your current workforce management process as well as your current pain points and future business goals. Following the discovery, your CSM will create a baseline Shiftboard solution design that reflects those requirements, as well as recommended best practices for your industry and use cases. The solution baseline will also include some sample 'real-life' workers and shifts from data you supply to us.

#### **Your role in this activity:**

We will ask your team to complete a short requirements survey as input to this process. Included within that survey are about 40 questions on your workforce management business processes that should only require brief (1 or 2 sentence) answers. The survey also has a section for you to provide us data on your workers and standard shifts. You can provide us either all, or a representative set, of this data. After we receive and review your survey we will ask you to participate in a requirements and as-is process review to fully understand your business needs.

## Phase 2 - Solutioning

### Activity – Agile Design Sprints

**Customer Success Manager provides:**

Conduct solution refinement sessions with up to two separate functional groups in your organization – to refine the initial baseline solution design into a complete Shiftboard configuration. This approach allows us to address the needs of departments with different scheduling and communication requirements – for example a call center and a logistics department.

**Your role in this activity:**

Participate in the solution refinement sessions for their relevant group and provide input to further refine the design to your business needs.

### Activity – Initial Data Conversion

**Customer Success Manager provides:**

Auto-loading of critical business data into Shiftboard. Your CSM will provide you spreadsheets to collect the data and run the validation and load scripts to enter them. We will perform one person upload for each type (profile) of individual you track. additionally, we can if required auto-load availability information and control data such as clients and locations.

**Your role in this activity:**

Your team’s role will be to compile the data in the correct format for a one-time load in each category, and to validate the correctness and completeness of the data loaded. Separately, you can use Shiftboard’s established bulk upload capabilities to auto-load schedules into the system if desired.

## Activity – Integration and Reporting Review

### **Customer Success Manager provides:**

Your CSM will work with your team to review Shiftboard reporting and integration capabilities, including standard data extracts of Scheduling or Timekeeping data that can be sent to Payroll or other Workforce Management systems.

Should you require such a transactional extract in a specific format this can be built but will likely require a separate proposal as custom development is not included within the package. However your CSM will assist with that Design and Testing process. If requested, your CSM can also provide you an overview of Shiftboard's Drop Point batch integration toolset, and a Guide to API calls for real-time integrations. They will also assist with responses to questions as you use Drop Point or develop API calls.

### **Your role in this activity:**

Your team will work with the CSM to understand Shiftboard reporting and integration capabilities

If you choose to utilize Drop Point or API's your team will need to understand and develop calls from third-party systems that are requesting or sending data from or to Shiftboard.

## Activity – Process Testing

### **Customer Success Manager provides:**

To launch your testing acceptance of the Shiftboard solution design, your CSM will conduct a testing workshop with your team. At that workshop we will present our pre-written test cases to help you quickly confirm all features that you need are enabled. The test cases will identify test threads both by user role and by business process (e.g. Manager role for New Hire process, User role in Shift Assignment and confirmation).

Following the Testing Workshop your CSM will support your testing efforts by responding to and resolving testing issues and questions logged in the Issues List, for up to 4 weeks following the Testing Readiness session. During weekly status meetings we will review test progress with you.

### **Your role in this activity:**

Your team will attend the Testing Workshop. Following the workshop, you will use Shiftboard's pre-written test cases to build out all the testing you need to complete, and then conduct that testing. When you need support on testing questions you will log test issues for your CSM to respond to.

## Phase 3 – Enabled Adoption

### Activity – User Adoption

Typically the biggest risk in your onboarding is user adoption. User adoption risk can be mitigated through properly addressing change management internally. Such change management communication should promote the benefits of a scheduling solution within a mobile app that empowers the employee to make real-time adjustments to availability, PTO and picking up additional shifts when available.

#### **Customer Success Manager provides:**

To plan your user adoption, your CSM will conduct a user adoption strategy session with your team. This session will consider the features to be used by the principal end-user roles (scheduling manager, coordinator, member), together with the specific use cases for your Shiftboard solution. Your CSM will then recommend a strategy for end-user training, leveraging Shiftboard collateral such as videos and how-to guides as appropriate. Within the user adoption strategy session your CSM will also present our best practices and recommended strategy for change management and communication with the end-user community.

Your CSM may also deliver one end-user training class, typically to Schedulers or Supervisors, in a format that can be attended / recorded by your team to conduct additional trainings.

The CSM is available for questions and support as your team develops and delivers your end-user communications and training. Optionally: the CSM can be engaged directly in additional end-user training delivery and/or collateral development, however these would be additional services to the standard Guided Success package.

#### **Your role in this activity:**

Your team will attend the user adoption and change management strategy sessions. Following that session, you will create the training content and material, then deliver those trainings and communications.

## Activity – Managed Cutover

### **Customer Success Manager provides:**

As you approach go-live your CSM will plan the cutover with your team. A cutover plan will be developed to agree and document specific cutover tasks (such as final data loads, announcements, etc.) ahead of go-live.

Within the Guided Success package we can support one or two phased go-lives. This approach allows you to have separate go-lives for two departments, or run an initial small-group pilot if you desire. At go-live your CSM will work with you to execute the cutover steps agreed in the cutover plan.

Following cutover your CSM will continue to support you directly (hyper-care) for one scheduling period, or a maximum of 4 weeks. Following that period your CSM will formally transition you to Shiftboard support, and we can jointly celebrate a successfully completed project!

### **Your role in this activity:**

Your team will attend the cutover planning session and provide input to the cutover plan tasks and dates.

You will work with the CSM on assigned tasks for the cutover, and log issues for any support required or questions your team has. After the hyper-care period (one scheduling period) you will formally be transitioned to Shiftboard support for your ongoing production support questions.

## Ongoing – Project Management

### Activity – Project Management

### **Customer success manager provides:**

Your CSM will conduct weekly status calls with your team to review progress against the work plan, risks and issues, and forthcoming activities. We will provide progress reports on the status of the onboarding to your management team via the online project workspace. Note that CSM project management services are limited to supporting the onboarding tasks defined above.

### **Your role in this activity:**

Responsible for driving the customer team toward completion of the project. This includes assigning work to team members, ensuring that all data is gathered quickly and in the correct format(s), and following up with team members on all tasks and due dates in order to keep the project on track. The PM will provide input and updates to the project timeline and dates which can be adjusted for customer team member availability. Plan out the customer activities listed above, including testing and end-user training work. The PM will also work to get outstanding questions answered and to build consensus internally to take timely decisions on the project.

## Ongoing – Education

### Activity – Core Team Training

#### **Customer Success Manager provides:**

Your CSM will deliver the following discrete training sessions on Shiftboard (some sessions may be skipped based on the product components you are enabling):

- Fundamentals of Shiftboard – pre-recorded (30 mins)
- Foundational components – people and workgroups – 1 hr
- Scheduling tools – 1 hr
- Other tools – 1 hr
- API, download, extract and custom reports – 1 hr

Within each unit we will train you on application use and how to change application settings. Training sessions will be scheduled within your onboarding plan to support related activities.

#### **Your role in this activity:**

Prior to taking instructor-led training we will ask your project team to review “Introduction to Navigation” videos so that you are familiar with Shiftboard application basics. The subsequent instructor-led training provided will be a blend of demonstration and hands-on practice for your team. Your team should participate in each training relevant to their role, and complete the exercises assigned within the sessions. Following the training your team will take ownership of the current Shiftboard solution design and refine it further to your business needs as required.

### Additional Scope

The following are not included in the base Guided Success package but can be scoped additionally:

- Design / Testing sessions for additional scheduling workgroups within your organization
- Additional interfaces vs. above scope
- Additional data conversions vs. above scope
- Custom reports beyond Shiftboard web reporting capabilities
- Deployment cutovers for additional scheduling workgroups within your organization
- Training sessions post Go-Live

### Team Commitment

Shiftboard is committed to providing all customers with an industry-leading onboarding program. We dedicate significant resources to your account to complete the Implementation process in a timely and efficient manner. However, due to resource constraints and to best serve all customers, we are unable to provide unlimited team access. All training and support in this package will expire 150 days from contract execution. Additional services are available after this time for additional cost, please contact your Account Manager for additional details.



## Customer Project Resource Guide

The following guide describes typical team responsibilities. Note that many onboardings only require a subset of these resources.

<b>Role</b>	<b>Description</b>	<b>Hours a week</b>
Project Sponsor [Required]	Executive driver of solution who explains goals and anticipated business benefits; also advises on business decisions and prioritization for solution design decisions. Acts as business sponsor in User Adoption and Change Management activities	0 - 2
Project Manager [Required]	Responsible for driving the customer team toward completion of the project. This includes assigning work to team members, ensuring that all data is gathered quickly and in the correct format(s), and following up with team members on all tasks and due dates in order to keep the project on track. The PM will provide input and updates to the project timeline and dates which can be adjusted for customer team member availability. Plan out the customer activities listed above, including testing and end-user training work. The PM will also work to get outstanding questions answered and to build consensus internally to take timely decisions on the project.	4 - 8
Scheduling Operations [Required]	Subject Matter Expert(s) on scheduling operations for your business units. Attends discovery and design sessions, education sessions, and progresses testing activities following the testing workshop. Typically your future Site Administrator in production will also come from this group.	8 - 12
Human Resources [Optional]	Where relevant: Subject Matter Expert(s) on HR information, and self-service functions such as Time Off Requests. Attends discovery and design sessions, education sessions, and progresses testing activities following the testing workshop.	0 - 8
Payroll & Finance [Optional]	Where relevant: Subject Matter Expert(s) on Finance information including Payroll data, that Shiftboard will provide to other systems. Attends relevant discovery and design sessions, education sessions, and progresses testing activities following the testing workshop.	0 - 8
Information Technology (Integration) [Optional]	Where relevant: Technology experts for Integration to 3 <sup>rd</sup> party systems, and potentially other technology requirements such as Single Sign-on. Typically involved in providing data feeds to and from Shiftboard. Attends relevant discovery and design sessions, education sessions, and progresses integration activities	0 - 4

Note that roles above may be completed by one or more resources. Additionally, one resource may staff multiple roles, based on their skills and availability. If critical customer project roles remain unfilled, onboarding may be delayed.