the Layer®

Customer Onboarding Guide

Welcome to the beginning of your new CRM

We can't wait to get underway with your project!

This Onboarding guide will take you through the steps involved with setting you up on The Layer.

Reading this will prepare you for what to expect, when to expect it and who is involved at each step. We'll also introduce you to the tools we use to help us manage the project and deliver a successful launch.

*This document is an example of how we manage a typical project. It does not factor in any special requirements, so be aware that the timescales seen below are subject to change.**

Let’s start at the beginning!

Quote signed

After you’ve signed the quote, we discuss dates with yourself to understand when is best to hold our Project Introduction session and kick off the project.

We also need to find out who the key stakeholders are and confirm their involvement with the project.

Meet the team

Before your project gets underway, you need to meet the team!

We like to get familiar with our new customers straight away. To do this, we have an introduction session between the Sales Team, Product Team, Project Team and yourselves. This typically takes place virtually using MS Teams.

Project Introduction

We’ll introduce ourselves and explain how we’re each involved in your project. This includes providing an overview of the BA and Project process.

Pre-BA session preparation

We will email you this **Customer Onboarding Guide** along with our **Pre-BA Session Preparation Document**. This document contains a check list of key points we would like to know before hosting our BA sessions such as examples of existing processes, documents that you are currently working from and spreadsheets for reporting. We’ll send you a secure link to SharePoint to upload this.

Listening to what you have to say.

Scheduling the BA

We'll schedule BA sessions based on your departments and availability.

Once we know the start date, we'll provide an indicative launch date.

Management Session & PID

We complete the Management Session first. This ensures that the project is focussed on areas which will benefit the whole business, not just one department. Following this, we'll send our **Project Initiation Document (PID)**. This details the Project Objectives, Success Markers, Timescales and Roles and Responsibilities.

BA Preparation

Before we get underway, it's important that your Project Leader(s) are fully aware of your current business processes. It's their role to convey these to us and confirm that the right people are on each BA session.

Involvement

Commitment is key.

We require the Project Leader from your company on each session. In our experience, it's beneficial to include end-users in this process as well.

Their involvement allows us to get to the heart of your day to day processes and make sure that The Layer will work for them.

WARNING

Business Analysis (BA)

How do we start?

Our BA sessions are usually scheduled across a 3 week period. Some of your departments with more intricate processes may require additional sessions, and that's perfectly fine! We don't want to rush this part of the process as getting it right means that everything that follows will run smoothly.

In our business analysis sessions, we'll discuss your current systems and processes with your key users. Throughout this, our Product Team begin to document your business processes and map them to The Layer. We'll also identify any configuration requirements so that we can plan our approach to getting your system ready.

What's involved?

Our BA sessions are designed to understand your internal processes. Getting the full picture of your daily, weekly and monthly activities helps us to map your processes to The Layer.

We want to hear from end-users as well, specifically, their frustrations. If your current processes are causing issues, we can use this as an opportunity to revolutionise the way you work.

If any custom development work is requested or deemed essential, we'll take that into consideration as well.

What's Next?

After each of your departments have been analysed, we begin crafting the **BA Review Report**. This document will advise on how you will use The Layer. It will highlight the differences between your existing processes and your new ones, and it will identify the main configuration decisions and development points (if required).

Once this has been finalised, we'll send you the report. You can take some time to review this yourself, but we'll also schedule a meeting with you to discuss our findings, potential solutions and agreed approach. If you're happy with this, we'll ask you to sign off.

Overview

- **Understand your departmental structure**
  Understanding what activities your departments perform
- **Obtain process documents**
  An early indication of what processes you're using
- **Create BA agendas**
  Our guide for each BA. session, shared with you
- **Schedule BA sessions**
  Arranging a suitable time for all required attendees

- **Discussing your processes**
  Discuss processes with managers and end-users
- **Listen to frustrations**
  Understand issues with current processes
- **Document your processes**
  Building our understanding of how you work
- **Additional development required?**
  Review requirements against what we currently provide

- **BA review report**
  A review report to highlight our findings and solutions
- **Differences between old and new**
  How you currently work VS how you'll use The Layer
- **Configuration and development**
  Summary of key config and dev requirements
- **Customer sign-off**
  Send review report and discuss with customer

Project Kick-Off

Configuration starts

Once we've agreed on your requirements, we can officially kick-off the project!

We use our **Project Set-up Template** to gather important information. This is an Excel file that details exactly what's required for each module. For example: Your user's names, suppliers and SLA hours

Catch-up calls & checkpoints

The **Project Set-Up Template** will be used in conjunction with weekly catch-up calls to help us communicate your operational requirements.

We also have regular checkpoint sessions with upper management to ensure that everyone's goals are still aligned. This can be a useful time to raise concerns.

- **Halfway Checkpoint** - 8 Week point
- **Pre-Launch Checkpoint** - 14 Week point
- **Post-Launch Checkpoint** - 3 Weeks post launch

Development starts

We'll keep you updated with progress on any potential development points. As features are published, we'll take you through the testing process so that you can sign them off

Project management

ClickUp

To manage projects from Sales to Customer Success, we use an application called **ClickUp**. Within here, we create different Tasks that relate to the set-up of your system.

What is ClickUp?

ClickUp is a project management software that allows us to document, collaborate and deliver on project-related activities. It's a clean and user-friendly platform that's used throughout the project life-cycle, enabling us to not only deliver our objectives, but deliver them successfully.

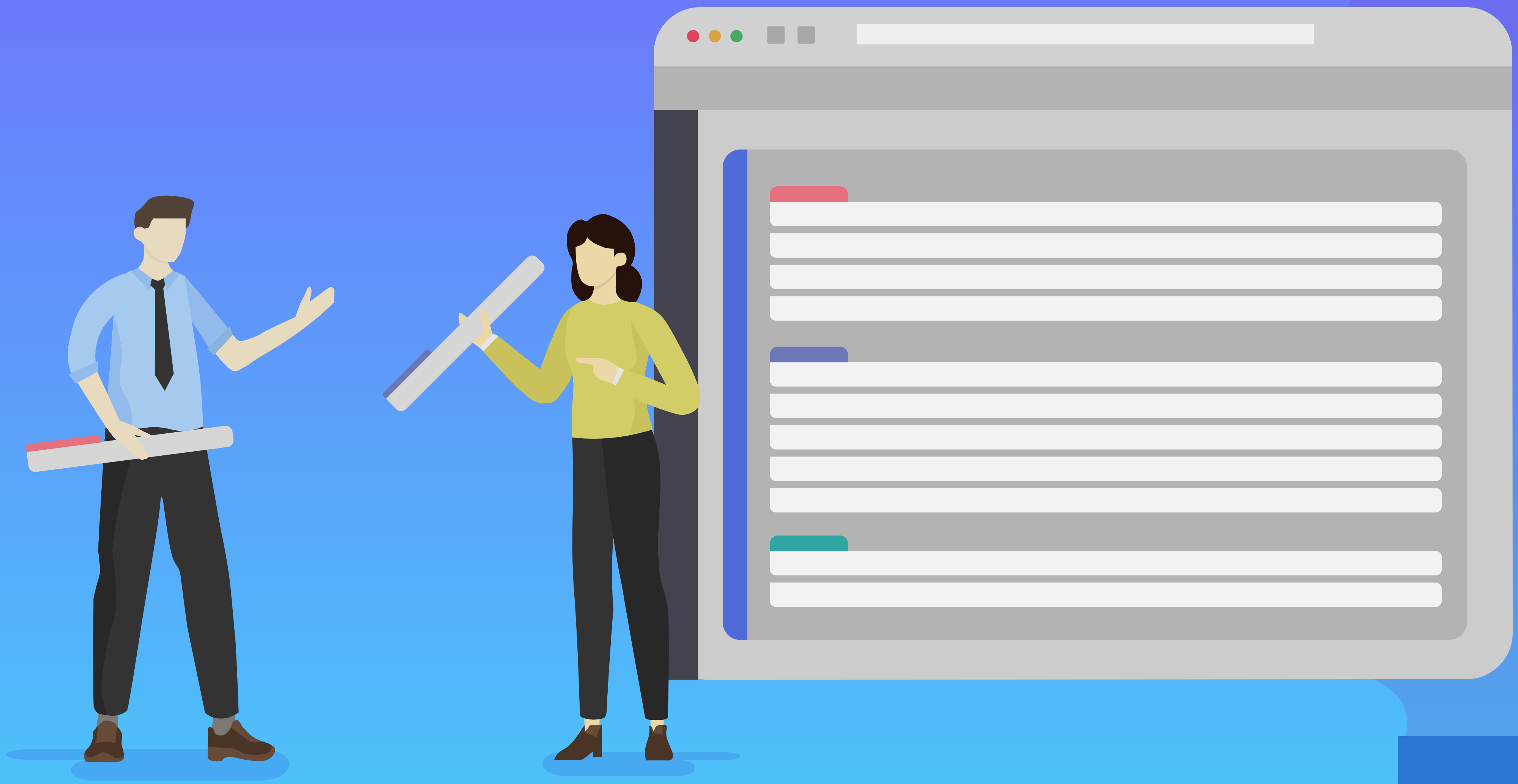
We will provide your key project stakeholders with training on how to use ClickUp, so that everyone is comfortable with the system.

What do we use it for?

ClickUp is used extensively throughout a project, from Sales to Customer Success. There are several Lists within your Project folder including Sales, Project, Development and Customer Success Handover. Each of these Lists contains Tasks. These Tasks are used to guide the process, collate information, plan activities and make decisions.

Your Involvement

Collaboration is vital to the project's success. The Key users from your company will be assigned Tasks that require their input. They'll always receive notifications when Tasks are assigned to them (so that they don't miss anything).



Project Overview

Data migration

Getting the Data Migration right plays a key role in the success of any project. We'll work with you to create a **Data Migration Plan** which will be used to map your existing data to The Layer.

We'll send you our import templates at the start of the project so you can understand our field names and formats.

UAT Testing

If you require additional development, we'll work with you to ensure that these features are completed to the agreed specification. **User Acceptance Testing (UAT)** sheets are used to help guide you through this process.

Configuration

What’s involved?

There are 7 core modules within The Layer, and we need to make sure that each one of them is tailored to your processes. Using our project plan on ClickUp, the modules are split into separate milestones. These milestones contain Tasks that detail specific config requirements. For example, in the Customer Service task, we’ll work on your Case Categories, SLA Hours, Case Statuses, etc.

Processes & run-throughs

We’ll work together to configure each module. Our catch up calls will drive progress and allow us to complete tasks on time. At the end of each module, we’ll arrange a run-through session with your Project Leader and key members of your teams (E.G. Sales Managers on the Sales run-through).

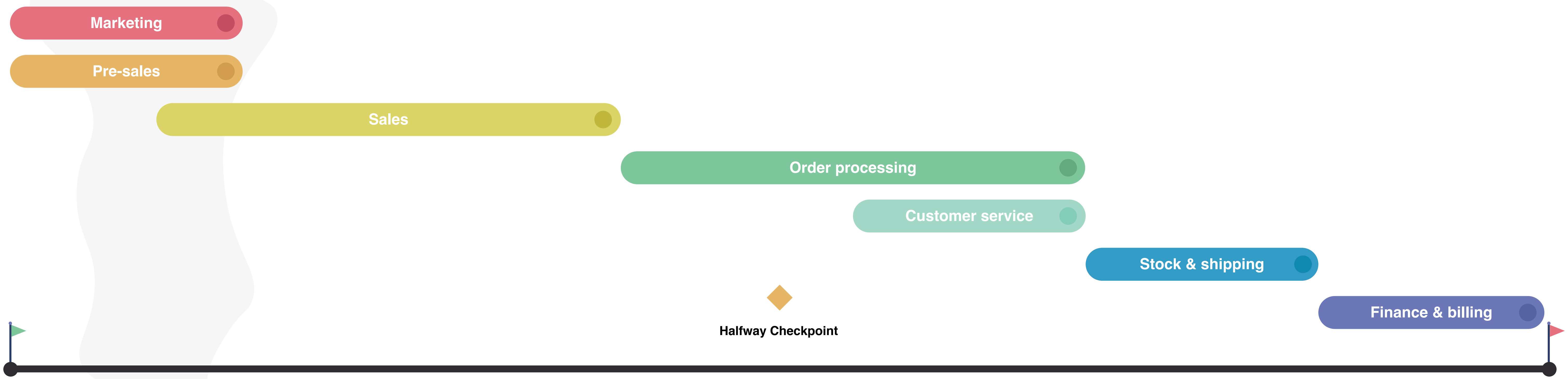
We’ll also create written process documents so that you can refer back to these afterwards.

Workshops

Along with run-through sessions, we’ll conduct user workshops. These will allow your users to get hands-on experience with The Layer. As this immediately follows a run-through session, they can put what they’ve just been taught into practice.

We find that this helps end-users adapt to your new processes and allows them to raise any questions or concerns. The earlier these are addressed, the better!

Configuration Schedule:



* Price books, settings and data migration span the length of the entire project

Development Sign-Off

Access to testing

Key users will be granted access to the system throughout the configuration stage. We do this so that you can begin to test The Layer with your new processes.

These key users will eventually become your Layer Champions as they begin to familiarise themselves with the system's functionality.

Pre-launch checkpoint

Before you launch, we want to check in with your Project Leader to make sure they're confident with everything that's been done so far.

This session is an excellent time to raise any last concerns before we get ready to train your staff and import your data.

Development sign-off

Once all of your agreed development points have passed the UAT stage, we'll ask if you're happy to close off this part of the project. This brings an end to our Development trail.

DD set-up

Before you launch, we need to set up the Direct Debit. This will be handled by the Sales Team

Staff Training

Before we start

By this point in the project, all of your configuration work and development features have been signed-off. We just need to train your end-users and import your live data.

It’s beneficial to know the names of all users that will be required for each session in advance. We’re normally familiar with all of them by know but we understand that staff can come-and-go.

The process

Ideally, we train staff around 2 weeks before launch. If you have any special requirements, please let us know beforehand.

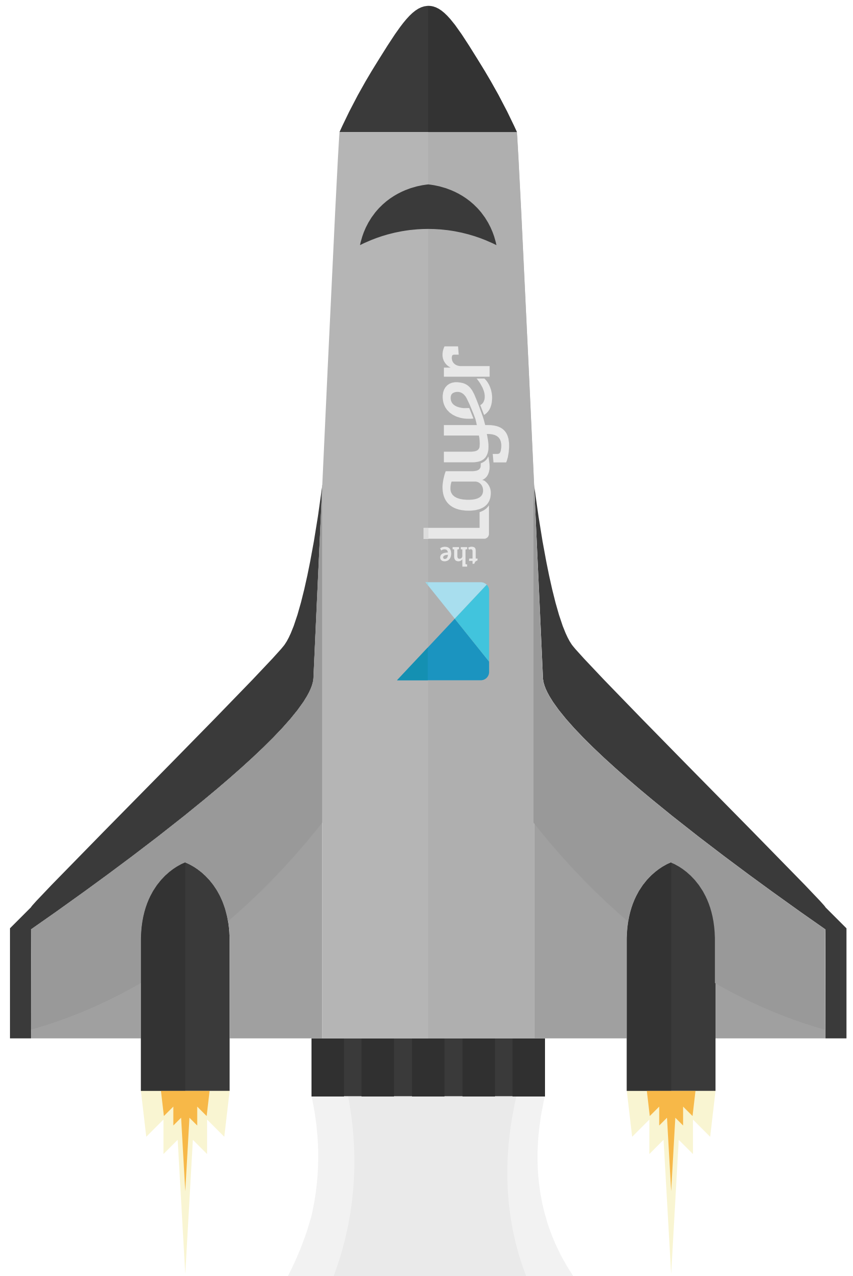
Generally, training takes place online via MS Teams and will be led by the Business Analyst assigned to your project as they have the best knowledge of your entire process.

At the end

By the end of the training schedule, each of your departments will be trained on how to use The Layer. These sessions are recorded and sent to you along with written process documents so that you can refer to these afterwards.

If any additional training is required, we can talk about fitting that into our plan. However, there may be some budget and schedule implications.

Data Migration and Launch



Data migration

Migrating your data over to The Layer is the last step before you Go-Live. Throughout the project, we work with you to produce sample import sheets from your current systems. This refinement process means that at this point, your data is in great shape for migration.

Data Migration generally takes place out-of-hours so that it's ready for launch.

At the end of each import, we conduct checks to make sure your data is accurate and matches the volume that you sent us.

Preparing for take-off

You've made it to the end of the journey!

Once your data has been successfully imported, you can start using The Layer as your new CRM system for sales, service, marketing, finance and more.

Although you've launched, the Project Team will stick around for a while longer to make sure you're comfortable with everything and that your end-users are enjoying the system.

Post-Launch checkpoint

3 weeks after you launch, we'll arrange a session with your Project Leader to evaluate against the project objectives and success markers.

Customer Success Handover

Pre-handover

Once you have launched and any post-launch feedback has been handled, the project team will hand over to the Customer Success Team. This involves sharing information within the team about who your key contacts are and what your unique processes look like.

We expect your Layer champions to be the first point of contact for your end-users if they have any issues or questions.

Handover

We arrange a session to introduce yourselves to our Customer Success Team. Here, we'll discuss ways you can get support for Layer Products.

- Knowledgebase Articles
- Customer Portal
- Live Chat
- Phone Support

Post-handover

Our Customer Success Team have great knowledge of The Layer, however, if you report something that doesn't look or work right, we'll investigate this and raise a support case if required. These are managed through our version of The Layer so that we can quickly and thoroughly get to the bottom of your issue.

Our support hours are 09:00 AM - 17:30 PM, Monday to Friday. We also have an out of hours monitoring feature to ensure that your system and data is safe and secure.

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