Assisted Onboarding Concierge Plan

The Challenge

Implementation and migration of enterprise software solutions can be complex, time-consuming, and leave an organization exposed to variety of risks.

Once clients have selected the Smarsh solutions to meet their needs, the large number of stakeholder-interactions required as part of product onboarding and the burden on time and resources for existing IT and Compliance teams means there is distinct value in someone external managing the onboarding process to ensure seamless and successful implementation.

The Solution

The Assisted Onboarding Concierge plan provides clients with additional services during the onboarding process beyond what is included in the traditional setup fee.

A Project Manager serves as your consistent point of contact, coordinating with Sales to define your vision for initial success and providing implementation, training and onboarding support for a period of 90 days to ensure your organization realizes the full value of your solution. As every implementation is unique, extended engagement with Assisted Onboarding is available as needed.

With our Concierge plan, you can focus on what matters; your business, while leaving the implementation and onboarding headaches to our expert team, who have the success of numerous implementations behind them.

Key Differentiators

With a traditional, out-of-the-box setup, our Implementation team will reach out to you by email to obtain product provisioning requirements. By comparison, with Assisted Onboarding, your assigned Project Manager will schedule a kick-off call and will handle all the elements of your implementation and onboarding process for the 90-day period following kick-off. Details of what is included with Traditional Setup vs Assisted Onboarding are set out in the table below:

Feature	Traditional Setup	Assisted Onboarding
Smarsh provisioning of archiving services	✔	✔
Administrator training (See Services Matrix for details)	✔	✔
Access to Smarsh Central with a full suite of User Guides and Knowledge Base Articles	✔	✔
Standard 3rd Party Attestation Letter	✔	✔
Consistent point of contact, shared resource		✔
Detailed Project Management Plan		✔
Data connection verification		✔
End User Communications		✔
Custom 3rd Party Attestation Letter, if needed		✔
Initial Policy Tuning (if Policy Library purchased)		✔
Weekly Check-in Call		✔
Monthly Status Report		✔
Final Debriefing Report		✔
End-to-end Provisioning		✔
Phased Roll-out		(optional)

Use Cases

Having one point of contact

The Assisted Onboarding Concierge plan provides a consistent point of contact introduced prior to implementation kick-off who manages and directs all issues that arise during your implementation and onboarding process. Your assigned Project Manager provides regular status updates, communicates with key stakeholders in your organization and ensures smooth onboarding of Smarsh solutions so your teams are free to focus on their day-to-day business.

Managing data migration

As part of the onboarding experience, your Project Manager can assist with managing migration of your data from an existing archive.

Provisioning users & devising best practices

Your Project Manager will own your provisioning process from start to finish and suggest best practices for your organization, drawing on their deep product and onboarding experience.

Training end users

End-users and administrators may require additional training to ensure they are using the solution properly. Your Project Manager will coordinate tiered levels of end-user and administrator training, so your in-house teams can focus on core business needs.

Leveraging Smarsh expertise

Your Project Manager can connect the IT and Compliance resources within your company with the required Compliance and IT expertise at Smarsh to help you make the most of your solutions and meet regulatory obligations.

Reporting

Your Project Manager will generate and issue interim status reports to communicate overall progress to key stakeholders, in addition to creating a sign-off report at the end of the 90-day engagement detailing the adoption success and implementation status, as well as identifying any remaining areas of risk.

Rest assured that your organization will realize the full value of your solution by contacting 1-866-762-7741 today.