Assisted Onboarding Dedicated Specialist

The Challenge

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

Many of our largest clients operate at a level of scale and complexity that warrants a dedicated Project Manager for the implementation of their chosen Smarsh solutions. The number of stakeholders who need to be consulted as part of implementation and onboarding, and number of users to provision, as well as the potential for large data migrations, means there is a need for specialist project management to ensure seamless and successful implementation.

The Solution

The Assisted Onboarding Dedicated Specialist plan provides clients with additional services during the onboarding process beyond what is included in the traditional setup fee. This service is reserved for our largest clients who require a bespoke onboarding plan.

A dedicated Project Manager (available during Pacific Time business hours) serves as your consistent point of contact though every minute of your onboarding experience, 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 value of your solution. As every implementation is unique, extended engagement with Assisted Onboarding is available as needed.

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

Key Differentiators

With 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 the whole implementation and onboarding process. Details of what is included with Traditional Setup vs Assisted Onboarding are laid 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	✔	✔
Dedicated Project Management resource (available during Pacific Time business hours)		✔
Detailed Project Management Plan		✔
Data connection verification		✔
End User Communications		✔
Custom 3rd Party Attestation Letter, if needed		✔
Initial Policy Tuning (if Policy Library purchased)		✔
Daily Check-in Call and Weekly Status Report		✔
Final Debriefing Report (including technical configuration notes)		✔
On demand user and administrator training		✔
Custom report development		✔
End-to-end Provisioning		✔
Phased Roll-out		(optional)

Use Cases

Having one point of contact

The Assisted Onboarding Dedicated Specialist plan provides a single-point of contact introduced prior to implementation kickoff who manages and directs all issues that arise during the 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 the overall progress to key stakeholders, in addition to a sign-off report at the end of the onboarding period 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.