

Onboarding Guideline

1 Get Going <i>Time period: Typically 2-3 weeks</i>		2 Take Control <i>Time period: Typically 4-6 weeks</i>		3 Financial Integration <i>Time period: Typically 2-3 weeks</i>	
What We'll Do: <i>Load Projects & People</i>		What We'll Do: <i>1-1 Training</i>		What We'll Do: <i>Finance Training & Accounting Integration</i>	
What You'll Get: <i>Track Project Profitability</i>		What You'll Get: <i>Full Feature Utilisation</i>		What You'll Get: <i>Insights & Reporting</i>	
STEP 0	Engagement & Privacy Agreement Signed.	STEP 1	2 Hour Training Session for Project Managers.	STEP 1	Setup of Invoicing Configuration.
STEP 1	Complete Onboarding Sheet: List of Projects & People.	STEP 2	Focused Support for Implementation on Priority Projects.	STEP 2	1 Hour Initial Training with Finance Team.
STEP 2	Project & People Uploaded.	STEP 3	2 Hour Follow Up Training Sessions for Consolidation.	STEP 3	On-Going, On-Demand Support.
STEP 3	Logins Activated: Go Live.			STEP 4 optional	Link to Accounting Package (Xero/Sage).
STEP 4 optional	Import Historical Data.				
33%		66%		100%	

 Client

 Fresh Projects