Onboarding with Claromentis

What is onboarding?

In a nutshell, onboarding is where our team work with you to get your intranet set up and ready for your company-wide launch.

As part of your discussion with our Sales team, you would have purchased "assistance and training hours". These hours are crucial for helping you get the most out of your intranet. During this time, you will have guided sessions with our onboarding team, who will help you get your intranet ready to be used by your wider community. You can use these hours however you wish, and we'll track everything via a Google spreadsheet that we will share with you following our first call. (Please note that meetings, sessions, and implementation will be deducted from these hours.)

We'll help you build your intranet

You can also choose to have an intranet components demo with us. This is simply a showcase of widgets that can be added to your intranet pages. You may have already seen what is available when using your temporary playground, but extended members of your team may find it helpful.

Whether you launch your intranet in one go or in phases, we will be with you every step the way!

What to expect during onboarding

There are two different paths for onboarding. We can either build your intranet pages for you or work together in a collaborative style. The two paths have the following processes:

We build for you	We build together
1. Onboarding requirements meeting	1. Onboarding requirements meeting
2. Onboarding implementation	2. Collaborative build sessions
3. Feedback call	3. Repeat step 2 if needed
4. Follow-up call, if needed	4. Training / tailored training
5. Training / tailored training	5. Transition to Discover (support portal)
6. Transition to Discover (support portal)	

Onboarding requirements meeting

The first step of the onboarding process is to discuss your requirements. During this meeting, we'll chat about your intranet expectations, and go through possible solutions and suggestions to make these happen.

Before the call, we will send you an agenda and a list of items that we will need from you to make sure the meeting is productive - we'll send this once we've scheduled the call. After the meeting, we'll carry out a Q&A session with you to make sure we've covered everything, and to discuss the project timeframe.

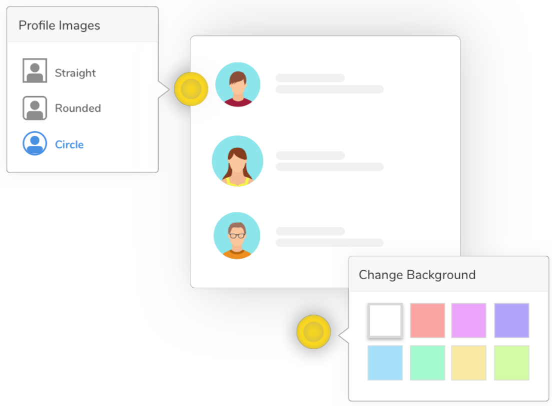
Onboarding checklist

- [x] Introductions
- [x] Goals, objectives & expectations
- [ ] Possible solutions
- [ ] Best practices

Onboarding implementation - we build for you

If you decide that you would like us to build your intranet pages, then we'll start this process as soon as we have all the requirements from you. We'll normally gather these requirements during our first call, but if you want a head start, here are some examples of what we will typically ask for:

- Site structure/map
- Branding guidelines, including colour schemes, logo, background image, and favicon
- A list of components you would like on your homepage – we'll send you a components guide at the time of scheduling so you know what to choose from
- A list of external URLs / links that you want quick access to from your intranet homepage. These will form the "fast access buttons" on your homepage. Please include any custom icons you would like to use for the buttons as well.



Following the implementation, we'll have a feedback call to show you the work carried out by our onboarding team. During this meeting we'll review the pages, make sure you're happy with them, and answer any questions you may have. Depending on your feedback, we may need to make further changes to your intranet pages and book a second meeting to discuss feedback.

Collaborative build sessions - we build together

We normally recommend that your intranet is built collaboratively with you, rather than for you. This is so you can understand how to build and manage your intranet from day one, and these sessions also double-up as training and an opportunity for real-time feedback.

Following your onboarding requirements meeting, our team will have a better understanding of what you are trying to achieve. This ensures our collaborative sessions are as productive as possible. These sessions will be an hour long and can be repeated as many times as you need - and we'll keep you updated when your hours are running low!

Training / tailored training

If you opted for our collaborative build sessions, training will have already been covered during this time. Of course, if you need additional training for those who could not attend the original sessions, we are happy to arrange this as well - just let us know and we can get this booked in.

If we built the pages for you, then following the sign-off from the feedback call we will book in the first session. The first session will normally be an introduction to the system, which will cover admin tools and permissions. Following this, we can set up tailored training for specific areas that you are most interested in. For example, if your HR team needs training on our HR application, or your internal comms team needs to understand how to use our content management tools, we are more than happy to arrange this for you - just let us know!

Transition to Discover (support portal)

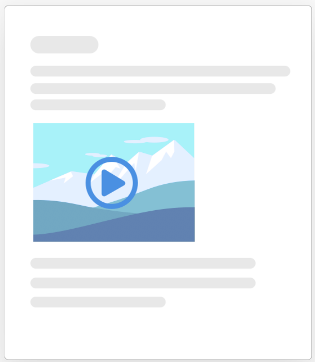
During our first call, we will give you a brief tour of our customer support portal, Discover. Discover will be your go-to place to communicate with our teams once you have launched your intranet. You can have up to 5 user accounts on Discover, and we will confirm with you who should have access before moving you over to our support portal.

You can access Discover here: https://discover.claromentis.com

Discover is home to loads of useful resources and features. Here's a summary of the main parts of Discover:

Knowledge Base

Our Knowledge Base contains users guides, articles, videos, and downloadable resources to help you use and manage your intranet. Most of the content on Knowledge Base is public facing, which means you don't need an account to access the resources. Our Knowledge Base is constantly being updated with new content by our teams, so you can get the latest advice and best practices.



Support tickets

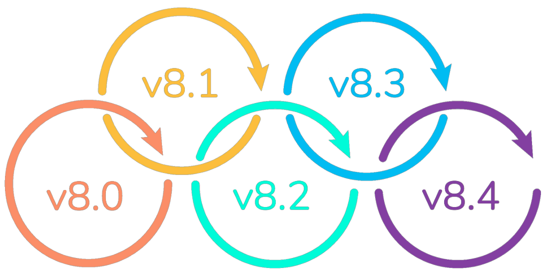
If you encounter an issue with your intranet or need some help, you can submit a support ticket. Our team will work with you as soon as they can to find a resolution and keep you updated within your support ticket.

Change requests

If you would like to make a change to your intranet which is outside the scope of our Design tool or Pages application, then you will need to submit a change request. Our team will work with you to assess if the change is possible and if it would require custom work. If a custom change is required, then our team will work with you through a change process. This will include requirements gathering, estimation, and confirmation before the work begins.

Upgrade requests

If you want to take advantage of the latest features or you are on a version of Claromentis we no longer support, you will need to submit an upgrade request. Our team will then book this in, taking into consideration a number of factors, including any complexities and if there will be any system downtime. All of this will be communicated to you at the time of the upgrade. In some cases, if you submit a support ticket and our team know a minor upgrade would resolve the issue, then they will submit an upgrade on your behalf and inform you of this.



Remaining assistance hours

Once we have finished the onboarding phase, you may not have used all of your assistance hours. Your assistance hours do not expire, so you can always use them after you have launched your intranet. Therefore, if you need further clarification or training on an aspect of your system, simply submit a support ticket on Discover and we'll book something in for you.

Working With Claromentis

We have almost 20 years of experience in building, designing, and deploying digital workplaces for both large and small organisations, across a wide range of industries.

Our extensive experience, coupled with outstanding technical support and custom development, ensures that we meet and surpass all of your diverse needs and expectations. We pride ourselves in our consultative approach; creating a holistic environment which supports your business through continual growth and development.

> *"REL needed a platform that allowed us to share information and knowledge with all our colleagues in an engaging way securely. Claromentis has provided us with a solution that matches our needs exactly and we are delighted with the uptake from our people and the flexibility of service provided."*
>
> *- Stephen Gordon, Managing Director*

Working closely with our customers and viewing every organisation as a unique entity sets us apart from the competition. Actively listening to your precise business needs and requirements allows us to deliver exactly the

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