CUSTOMER SUCCESS

Standard Customer Onboarding

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This document offers an outline of our standard onboarding process delivered by the RFPIO Professional Services Team. The RFPIO onboarding process has been designed to help you build a strong foundation for success with a strategic approach, so your team can start using the application for its primary purpose—dividing and conquering RFPs!

The Onboarding Process

Below is the outline of each phase of our onboarding process. For Onboarding, you will want to identify who will be your Core Admin Team - these users will be considered your "internal RFPIO power users", and they should attend the onboarding sessions as they will become your internal experts of the application. Our objective is to provide Train-the-Trainer experience to give the Core Admin Team enough resources to feel confident to start the implementation process with your larger team and additional RFPIO users. RFPIO's Standard Onboarding is defined yet flexible. Working with your RFPIO Onboarding Consultant, the plan can be adjusted and carried out in an average timeframe of 4-6 weeks, but can certainly be executed more quickly or at a slower pace depending on preference and availability of each customer

First, your Account Executive will introduce you to your Onboarding Consultant who will schedule the kick-off meeting. Your Onboarding Consultant, Customer Success Manager, and Account Manager will discuss your goals, outcomes and other details during the kickoff meeting. The details of the onboarding process are provided in the following pages.

	PHASE 1 Planning & Kick-off	**PHASE 2** Application Training	**PHASE 3** Implementation	**PHASE 4** Deployment & Adoption
Week	**1**	**2-3**	**3-5**	**6+**
Team	**Onboarding Team**	**Onboarding Team**	**Onboarding Team & CSM**	**CSM**
Sessions & Activities	Kick-off Meeting	Answer Library	Implementation Prep	Bi-weekly Office Hours
	Onboarding Prep**	Content Management	Implementation Workshop	Bi-Annual Account Review
	IT Configuration (as needed)**	Project Lifecycle	Go Live**	
		Organization Settings & Reporting*	Flex Sessions**	
		Custom Templates*		

**These sessions are not mandatory for onboarding completion, but the Onboarding Consultant will be able to provide a suggested plan for success based on kick-off meeting scoping.*

***These items are Customer Responsibility, see descriptions below.*

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Phase 1: Planning and Kick-Off

Kick-Off Meeting

Meeting: Zoom Meeting | 60 minutes
Attendees: Core Admin Team (or Main Point of Contact)
Responsible: RFPIO & Customer

The kick-off meeting introduces the RFPIO Onboarding Consultant as the direct point of contact during implementation, as well as the assigned Customer Success Manager and Account Manager (if applicable). The Onboarding Consultant will lead the strategic discussion to outline goals and provides an overview of the RFPIO onboarding process.

OBJECTIVES

- Define goals for implementation.
- OC to review the onboarding sessions, and share expectations on what the Customer needs prepared for training.
- Schedule Fundamentals Training sessions, if time permits.

REQUIREMENTS

- Access to calendar for schedule purposes. The RFPIO Champions or main point of contact is inattendance on this call. Customers may choose to also invite an Executive Sponsor.
- Review the Customer provided historical data documents and blank questionnaire.

Onboarding Prep

Responsible: Customer
Estimated 1.5 hours to review the Help Center Articles

During this phase you will be gathering the appropriate documents to send to your Onboarding Consultant, along with reviewing the relevant RFPIO Help Center articles to prepare for onboarding sessions.

OBJECTIVES

Customer to email CSM below documents required for Onboarding training:

- **Historical Data:** Content containing question-and-answer (Q&A) pairs for your Answer Library. This is usually an Answer Library document or past RFP (docx or xlsx format preferred)
- **Blank Questionnaire**: A blank RFP, RFI, or security questionnaire to be used to talk through a full project lifecycle (docx or xlsx preferred)

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REQUIREMENTS

- Review the "New User Adoption Checklist" to help you get started in the application (provided by OC after the kick-off meeting).
- Review Help Center articles prior to Onboarding for enhanced learning.
- Identify Core Admin Team — these are users that you will consider to be your "internal RFPIO power users". They should have the bandwidth to attend all training sessions.

IT Configuration (As Needed)

Responsible: Customer's Super Admin and IT Team
Estimated time: Varies depending on Customer's needs for set up and permissions

In order to have the best experience using RFPIO, it is important to make sure that everything is enabled in terms of your IT permissions. RFPIO's preferred browser is Google Chrome. After this step, your company should be fully prepared to use RFPIO in the technical sense. Some of the things that will help RFPIO function most efficiently are using:

- Google Chrome
- Enabling any IP restrictions
- Whitelisting RFPIO email
- Updating your password policy

Integrations Setup (if applicable):
RFPIO integrations are designed to be self-service and don't require training from your OC. Coordination with the Customer's IT Team is to be carried out by the Super Admin.

Configure Single Sign-on (if necessary), and configure any other integrations purchased based on Customer's priorities. Follow the Integration Guides provided by Onboarding Consultant.

Note: Complete set up of integrations are not required for onboarding or training. Reach out to **support@rfpio.com** *for any technical assistance.*

OBJECTIVES

- Ensure all users have a compatible browser installed.
- Firewalls are set up to allow email notifications from RFPIO.
- Ensure that all Admins have activated their RFPIO account and logged in to the system.
- (If applicable) Determine prioritization of integrations purchased. Coordinate with the IT Team for setup and configuration.

REQUIREMENTS

- Provide Admin access for IT Admins, in order to set up configurations.
- Confirm with your IT Team to ensure RFPIO is set up appropriately.
- Core Admin Team has verified their RFPIO account.

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Phase 2: Application Training

Answer Library Basics

Training: Zoom Meeting | 60 minutes
Attendees: Core Admin Team
Responsible: RFPIO & Customer

During this training, your Onboarding Consultant will guide your Core Admins through RFPIO Answer Library Basics. An admin from your team will share their screen and be guided through RFPIO-led training.

OBJECTIVES

- Understand how to load content into the Answer Library.
- Walk through an import document to understand how to map Question & Answer content into the Answer Library.
- Understand how to search and filter through the Answer Library.
- Understand key features of the Answer Library (i.e. View Properties, how to apply Bulk Updates, etc.)

REQUIREMENTS

- Historical data prepared for the training.
- Admins have reviewed relevant Help Center materials prior to training.
- One individual from the Core Admin Team able to share their screen to receive training.

Content Management

Training: Zoom Meeting | 45-60 minutes
Attendees: Core Admin Team
Responsible: RFPIO & Customer

During this training, your Onboarding Consultant will guide your Core Admins through RFPIO Content Management strategies. An admin from your team will share their screen and be guided through RFPIO-led training.

OBJECTIVES

- Understand best practices of organization tools and metadata in the Answer Library.
- Discuss your content organization strategy (i.e. Tags, Collections, Custom Fields, Owners, Review Cycles, etc.).
- Understand best practices of file attachment and Document Library in RFPIO.

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REQUIREMENTS

- Customer to import remaining/additional content into the Answer Library.
- One individual from Core Admin Team able to share their screen to receive training.

Project Lifecycle

Training: Zoom Meeting | 90 minutes
Attendees: Core Admin Team
Responsible: RFPIO & Customer

During this training your Onboarding Consultant will guide your Core Admins through RFPIO Projects. An admin from your team will share their screen and be guided through RFPIO-led training.

OBJECTIVES

- Understand how to create new projects.
- Understand how to assign authors & reviewers.
- Understand how to leverage the Recommendations tool to respond to questions.
- Understand how to collaborate within RFPIO projects.
- Understand how to export a project.
- Discuss current project processes and workflows, and how that might change or be applied in RFPIO.

REQUIREMENTS

- Blank RFx prepared for the training.
- Prior to the training session, Admins have reviewed Help Center materials provided by OC in kick-off meeting follow-up email.
- One individual from Core Admin Team able to share their screen to receive training.

Organization Settings & Reporting

Training: Zoom Meeting | 30-60 minutes
Attendees: Core Admin Team
Responsible: RFPIO & Customer

During this training, your Onboarding Consultant will guide your Core Admins through RFPIO Organization Settings & high-level Reporting. An admin from your team will share their screen and be guided through RFPIO-led training. While this session is not mandatory, it is recommended and available based on the Customer's preference or OC recommendation.

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OBJECTIVES

- Understand settings and features available in the Organization Settings.
- Review the standard reporting capabilities within the application.

REQUIREMENTS

- Core Admins to think about success criteria and any specific reporting requirements, and share them with OC prior to this session.

Custom Templates

Training: Zoom Meeting | 60 minutes
Attendees: Core Admin Team
Responsible: RFPIO & Customer

During this training, your Onboarding Consultant will guide your Core Admins through RFPIO Response & Section Templates, which are beneficial for customized exported proposals. An admin from your team will share their screen and be guided through RFPIO-led training. While this session is not mandatory, it is recommended and available based on the Customer’s preference or OC recommendation.

OBJECTIVES

- Understand the purposes and use cases for Response Templates & Section Templates in RFPIO.
- Understand how to build and add Section Templates into a project.
- Understand key components within the Word Template Document & configure the Response Template in RFPIO.
- To be able to export a project to a Response Template.

REQUIREMENTS

- Review the Help Center article provided by the CSM, prior to this session.
- Provide one or more examples of a completed, styled proposal (or your existing Word template) to the OC prior to this session.

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Phase 3: Implementation

Implementation Prep

Responsible: Customer
Estimated time: ~1 week

The purpose of this exercise is to encourage Core Admins to practice learnings from the training sessions, so they can confidently use the system. Core Admins should be able to:

- Import/Create a new Project
- Assign Authors/ Reviewers to a project
- Use the Recommendation Engine to respond to project questions
- Import/Add content into the Answer Library
- Define Project name and Tagging conventions

Please write down and compile all questions during this step and send them to your OC.

OBJECTIVES

- To be competent and confident in completing an RFP project in RFPIO.
- To be confident in knowing how to search and leverage your Answer Library content.

REQUIREMENTS

- Core Admins to spend dedicated time in RFPIO to dive deeper into the tool and send a question list to OC.

Implementation Workshop

Training: Zoom Meeting | 60 minutes
Attendees: Core Admin Team
Responsible: RFPIO & Customer

In this meeting, we will be reviewing the questions compiled from your time spent in the application. This marks the end of the initial Onboarding Cycle, at which point you will engage directly with your Customer Success Manager, who will provide strategic best practices and answer any outstanding questions you have about rolling this out to your team for the long-term.

OBJECTIVES

- Re-engage with Customer Success Manager.
- Customer to share plans for implementation: Content Management Strategy, Project Workflow, and Deployment Plan.
- Address open questions or concerns, if any.
- Cover additional best practices.

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REQUIREMENTS

- Send a list of open questions to OC prior to this session.
- Spend dedicated time in RFPIO to begin defining your content and project workflow.
- Come to this meeting with a good picture of your rollout plan to the team.

Go-Live!

Depending on Customer's goals and timeframes, Customer can plan for a soft-launch or full go-live within their organization at this phase.

Flex Sessions

After the Customer has deployed RFPIO within their team, Flex Sessions are provided to the Core Admin Team as additional training time led by the CSM. Flex Sessions are structured as separate 30-minute sessions. They are designed to promote continued learning in the application. These sessions are not mandatory, but are available to the Customer if preferred, or if recommended by the CSM. These sessions are only offered during the first year of onboarding.

Examples of Flex Sessions include: Answer Library Maintenance, Auto-Respond Best Practices, Proposal Builder, Welcome to RFPIO for Your Team, etc. Ask your CSM for recommended topics for your Flex Sessions.

Phase 4: Deployment & Adoption

Bi-weekly Office Hours

After the Customer has deployed RFPIO within their team, Office Hours are provided to the Core Admin Team as recurring scheduled meeting times with their CSM. During these sessions, CSMs will review progress toward goals and assist with enabling the Customer to measure success. General Q&A will also be addressed, as well as determining if additional training via Flex Sessions will be required. These sessions are highly recommended during the first 3 months of implementation.

Bi-annual Account Review

Account Reviews are scheduled strategic meetings between the Customer and RFPIO. The CSM will introduce the RFPIO Account Manager, review progress toward goals, share any important release updates or valuable new features, and evaluate any gaps or additional needs. The Core Admin Team will join in this meeting, but it is encouraged to invite RFPIO Champions and Executive Sponsors as well.

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Professional Services

RFPIO University is RFPIO's newest training resource. It is a series of on-demand courses - video training modules designed by RFPIO product experts. Once you become an RFPIO user, you'll be able to access RFPIO University! If your team requires additional support and training throughout onboarding, our Professional Services team can offer the below implementation services.

- Professional Service Hours - Flexible bundle of hours to perform various RFPIO Implementation, Project Management and/or Content Management related activities. PS Hours can be used at any time during the contract terms with RFPIO. Some tasks PS Hours can be used for:
  - Content Import and Organization
  - Response Template Setup and Configuration
  - Section Template Setup and Configuration
  - Consulting Services
  - User Training
  - Proposal Builder Setup and Configuration
  - Project creation, import, and mapping
  - Project export generation
- Data Migration - RFPIO to migrate Q&A pair content from a legacy system into RFPIO Answer Library
- User Training - RFPIO led remote end-user training for your expanded team

Speak with your Account Manager (if applicable) or Customer Success Manager to further discuss scope of your Professional Services needs.

Additional Resources

RFPIO University

RFPIO University is RFPIO's newest training resource. It is a series of on-demand courses - video training modules designed by RFPIO product experts. Once you become an RFPIO user, you'll be able to access RFPIO University!

Help Center

The Help Center is your greatest resource for RFPIO start guides, how-to's, release notes, best practices, and more! Once you become an RFPIO user, you'll be able to easily access the Help Center directly from your RFPIO application. Ask your Customer Success Manager if there is a specific article you are interested in... and don't worry, your CSM will provide plenty of articles during your onboarding.

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Webinars

RFPIO hosts a number of Webinars throughout the year, all designed to keep you engaged and in-the-know! Ask your Customer Success Manager how you can hear about these events. All previous webinars are available on-demand from the Help Center. **Watch them now.**

24/5 Support

RFPIO provides a dedicated team to provide you assistance, when you need it. Your Customer Success Manager will show you how to reach the Support team.

Response Management Slack Community

The Response Management Slack Group is your way to get in touch with other proposal professionals like you! There are channels for job announcements, resource sharing, career advice, and more. **Join the group here.**

RFPIO User Group

The RFPIO user group on LinkedIn is where RFPIO users go to share best practices, ask questions, and improve their skills. **Request to join the group here.**

The RFPIO Blog

The best blog for proposal teams looking to improve sales outcomes and drive productivity. **Subscribe to our blog** to stay informed about RFPIO best practices, proposal writing tips, and career advice!

Glossary of Terms

Customer Success Team Roles

- **Onboarding Consultant (OC)** - An assigned Onboarding Consultant will be introduced at your Kickoff Meeting and will act as the primary contact for onboarding efforts for Core Admins.
- **Customer Success Manager (CSM)** - An assigned CSM will act as the primary contact for consultative support. They will support you throughout your relationship with RFPIO.
- **Account Manager (AM)** - Customers will have an assigned AM who will assist with the ongoing health of your account via business indicators, KPIs, activity, etc. The AM will be introduced during the Kickoff Meeting, and will be responsible for account changes and renewal.
- **Support (Tier 1 & 2)** - RFPIO's Support Team is an additional resource for our clients in order to provide frontline support, answers to questions, troubleshooting, and general product help. During onboarding, your CSM will show you the best way to contact our Support Team.

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RFPIO User Roles

It's vital to understand which role each individual member on your team will take on within the RFPIO application. Once user roles are understood, we can begin to determine who should attend each of the various training sessions, as described in the outlined phases above.

Each of the following roles can access the content library (all or in part, depending on the role), but privacy settings can be applied to content or groups of content to restrict access.

Primary roles

- **Super Admin -** There is only one Super Admin in each organization. They have full access to everything system-wide. This is the primary designated personnel for RFPIO to reach out to**.**
- **Admin -** An Admin user role has full access to all content and projects, and can create other user profiles, including other Admins. They can edit company settings, invite new users, create new projects, and edit all sections and answers across all projects. The Admin team is who will be trained during onboarding.

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- **Manager -** Managers have full control of projects to which they are invited or created. The Manager can create, edit, assign projects and sections to a Team Member and respond to questions. However, Managers are limited to only projects they are involved with and cannot see every project across the instance.
- **Team Member -** The Team member role can author and review assigned sections and questions. Team Members can also make comments and clarifications on sections and questions within projects they are members of.
- **Project Requester -** The person who communicates with the proposal or bid team on a new opportunity by submitting the intake request with the attached RFP files. NOTE: Project Requester role can be seen only when intake request is enabled.

Non-credentialed users

- **Guests -** A Guest can only answer the questions and sections that they have been assigned. Any assignments a Guest receives will come through email and not from inside the instance. They cannot access your content library or log into RFPIO at all. Anyone, even a third party, can collaborate as a guest.