

# Freshworks Onboarding Solutions



Jumpstart your journey towards best-in-class employee engagement

## Employee Engagement Suite - Gold Plan

### Gold Plan Summary

- The Gold Plan is ideal for you if you are not too familiar with support solutions or if your support team is at limited capacity, and needs guided assistance with our Employee Engagement Suite (EES).
- Guided assistance is our enhanced implementation methodology that involves a framework-driven approach to deliver solutions that are standardized, repeatable, and scalable.
- The plan includes a named product specialist and an engagement manager who will help you drive the configuration of the solution by collaborating with your technical teams.
- To facilitate smooth onboarding, we will train you using our train-the-trainer model, and ensure expedient resolution of any training/technical issues. We will also share a repository of top solution articles to ensure that you have answers to the most frequently asked queries at your fingertips.

### Key Benefits

- Onboarding methodology built upon best practices from thousands of successful go-lives
- Launch with confidence and speed with our "Direct Partnership Model"
- Maximize ROI in shortest possible time and minimize onboarding risks

### Direct Partnership Model



#### Comprehensive Project Planning

Based on your needs, we will put together a comprehensive shared project plan, tailored to your requirements



#### Dedicated Consultation Sessions

Our high-calibre local teams in collaboration with our global team work with you to understand your business needs and aspirations



#### Methodical Training and Documentation

Training for system administrators and product champions, and customized project documentation to get you up and running



#### Stress Free Transition

Seamless handover to customer success and global support teams to drive adoption and ensure ongoing support



## Plan Overview



### 1. Initiate Phase

The objective of this phase is to set a strong foundation for the onboarding process for a successful and no-risk go-live. Major outcomes from this phase are gathering all requirements, defining scope and objectives, outlining key project activities along with roles and responsibilities, and training your system administrator and product champions on the configuration process.

 <p><b>Project Kick-off Call</b></p>	<p>Align customer and Freshworks' teams to define project objectives, scope, expectations and requirements for how the product will be utilized by your support team.</p> <p><i>Primary Ownership: Joint</i></p>
 <p><b>Requirements and scoping workshop</b></p>	<p>Workshop (typically remote) to review business processes, use-cases, integration requirements and migration needs.</p> <p><i>Primary Ownership: Joint</i></p>
 <p><b>Project Plan</b></p>	<p>Detailed project plan that typically includes tasks, owners, timelines and milestones. It will also cover details regarding system configuration and infrastructure setup (e.g. mailbox, firewall, single sign-on, etc).</p> <p><i>Primary Ownership: Freshworks</i></p>
 <p><b>System Administrator Training</b></p>	<p>Administrator training for system admin and product champions. The admin training will cover the out-of-the-box configurations and will equip your team with the knowledge to maximize the potential of the solution.</p> <p><i>Primary Ownership: Freshworks</i></p>



## 2. Configuration and Develop Phase

Freshworks EES is easy to configure, set up, learn and maintain. We will follow a collaborative approach to configuration and assist the right subject matter experts on your side to learn the product. Through the course of implementation, we will lead and implement some key workflows. You can build on this knowledge to implement any additional workflows needed with guidance from us.

Our Product Specialist will work with your management and admin team to strategize how the identified requirements can be enabled using the product functionality. For example:

- Dividing the agents into sensible support groups
- Designing the ticket form(s) to gather useful information while keeping the user experience simple
- Bringing clean and useful user data into the account to improve agent productivity
- Creating automations to get the right tickets to the right agents and reduce manual effort in ticket resolution



**Configuration**

- Joint configuration sessions to implement key workflows
- Weekly sprints between Freshworks product specialist and customer system admin

*Primary Ownership: Joint*



**Integration Development**

- Define the scope of integration
- Introduction of SI to help develop, test and deploy custom integrations

*Primary Ownership: Freshworks / System Integrator (SI)*



**Data migration**

Migration of up to 50,000 records and 500 solution articles

*Primary Ownership: Joint*

### Typical configurations in Gold Plan

#### Freshservice

- Out-of-the-box configurations
- Email Setup
- Agent setup
- Role Configuration
- Group Setup
- Business Hours and SLA
- Solution Article Setup
- Incident Management
- Service catalog Management
- Problem Management
- Change Management
- Release Management
- Asset Management
- Automation Rules (Workflow Automator / Supervisor / Scenario Automation)
- Reporting

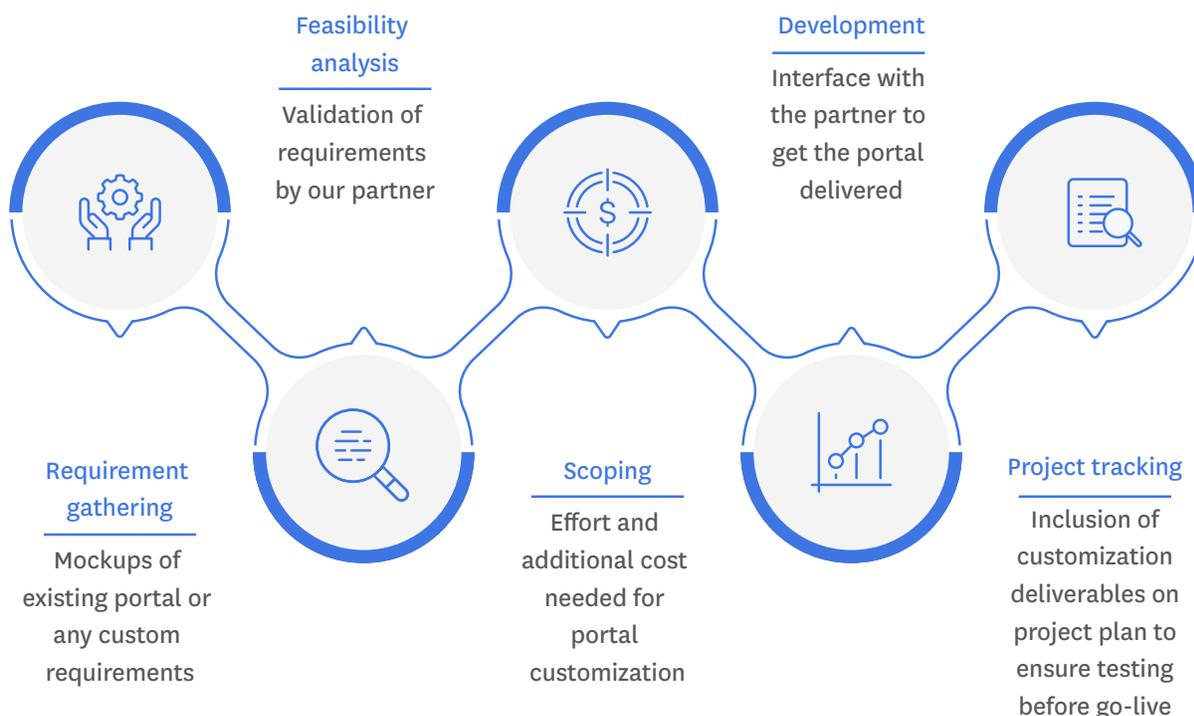
#### Optional add-ons

- Freshchat
- Freshcaller



## Portal Customization

Our products come with an out-of-the-box portal that provides all the necessary fields needed for your users to submit requests directly instead of using email, chat or calls. It can further be customized to adapt to your specific branding and usage behaviour. This can be accomplished via our network of partners, and will be charged separately. Our approach to portal customization is as follows:



## Integration Development

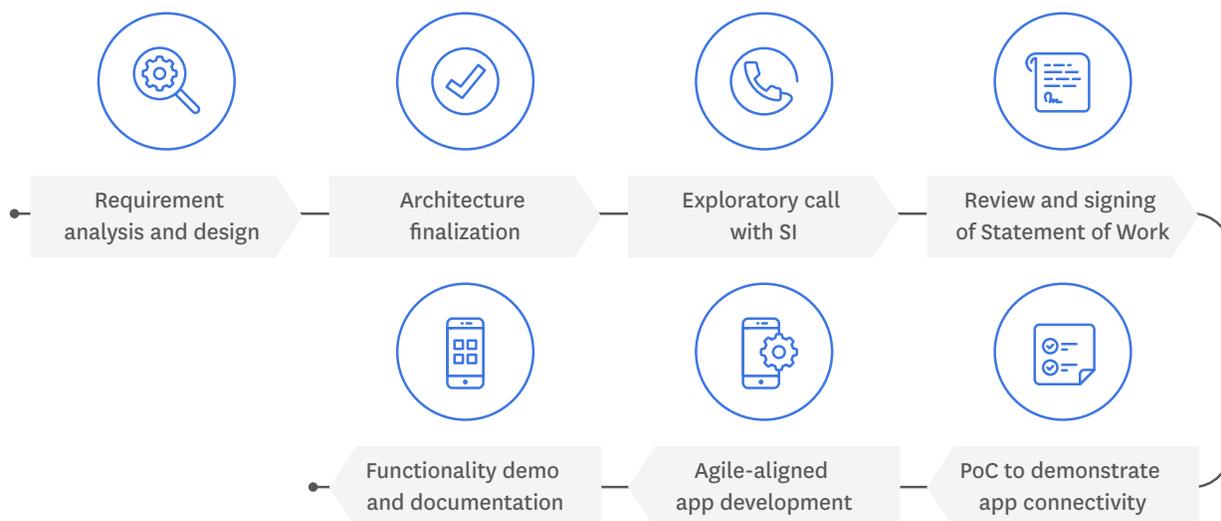
We will assist you with the set-up and integration of Freshworks [Marketplace](#) apps with your EES instance. Marketplace offers a wide selection of apps that can be configured in a matter of minutes.

### Custom Apps and Integration

In case of unavailability of a Marketplace app, we typically engage either our in-house development teams or one of our trusted System Integrator (SI) partners to develop the app or integration. Our methodology treats third party apps or integrations as a separate workstream and it will be priced

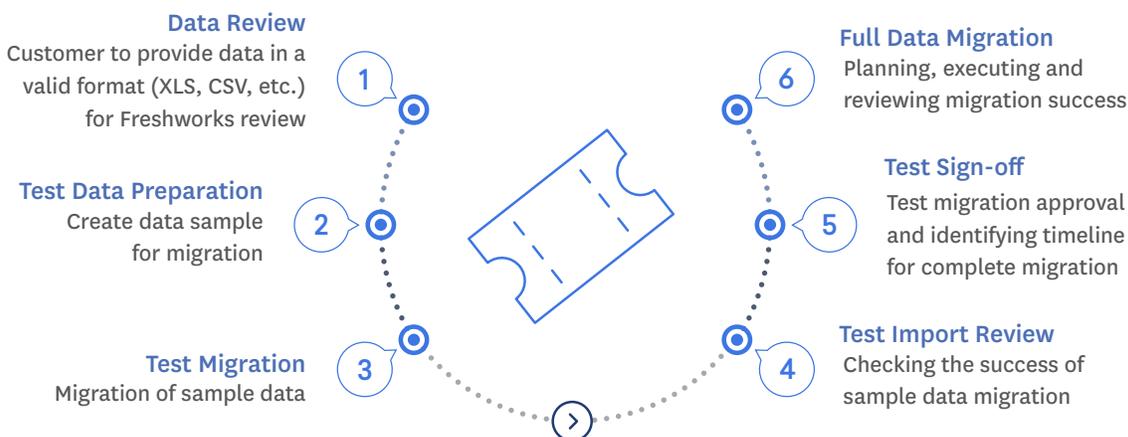


separately between you, the SI and Freshworks. Following is the approach we adopt when it comes to custom apps and integrations:



## Data Migration

The Gold plan offers you migration of up to 50,000 records and 500 solution articles subject to the following guidelines and considerations:



If necessary, additional migrations over 50,000 records can be considered and will incur additional charges. Please work with your account executive to know about the package that would work best for your needs.



### 3. Test and Train Phase

Training is the last phase before go live. In this phase, we will enable you on getting the most out of your implementation and provide you with key resources that will ensure your success. As a part of Gold plan, we will offer two remote training sessions (not exceeding 2 hours) to the system administrator and/or product champions identified by you. We will offer additional training if requested by you which will be chargeable on a time and material basis.



**Functional Testing**

- Creation of test cases
- Agree on test timeline and coordination to complete testing on time
- Issue tracking and prioritization
- Test sign-off

*Primary Ownership: Joint*

#### Resources

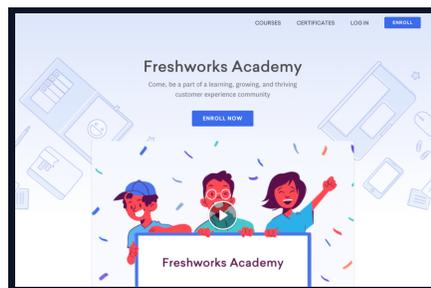
In addition to a training session(s), we will also provide you access Freshworks support portal and Freshworks Academy where you can find the latest training material to keep you up to speed with the solution.



**Training**

- Training using train-the-trainer model for product champions who will in turn train support teams and departments
- Online material and courses to understand the system and creation of end-user documentation reflecting any additional integrations or customizations

*Primary Ownership: Joint*



### 4. Go-live Phase



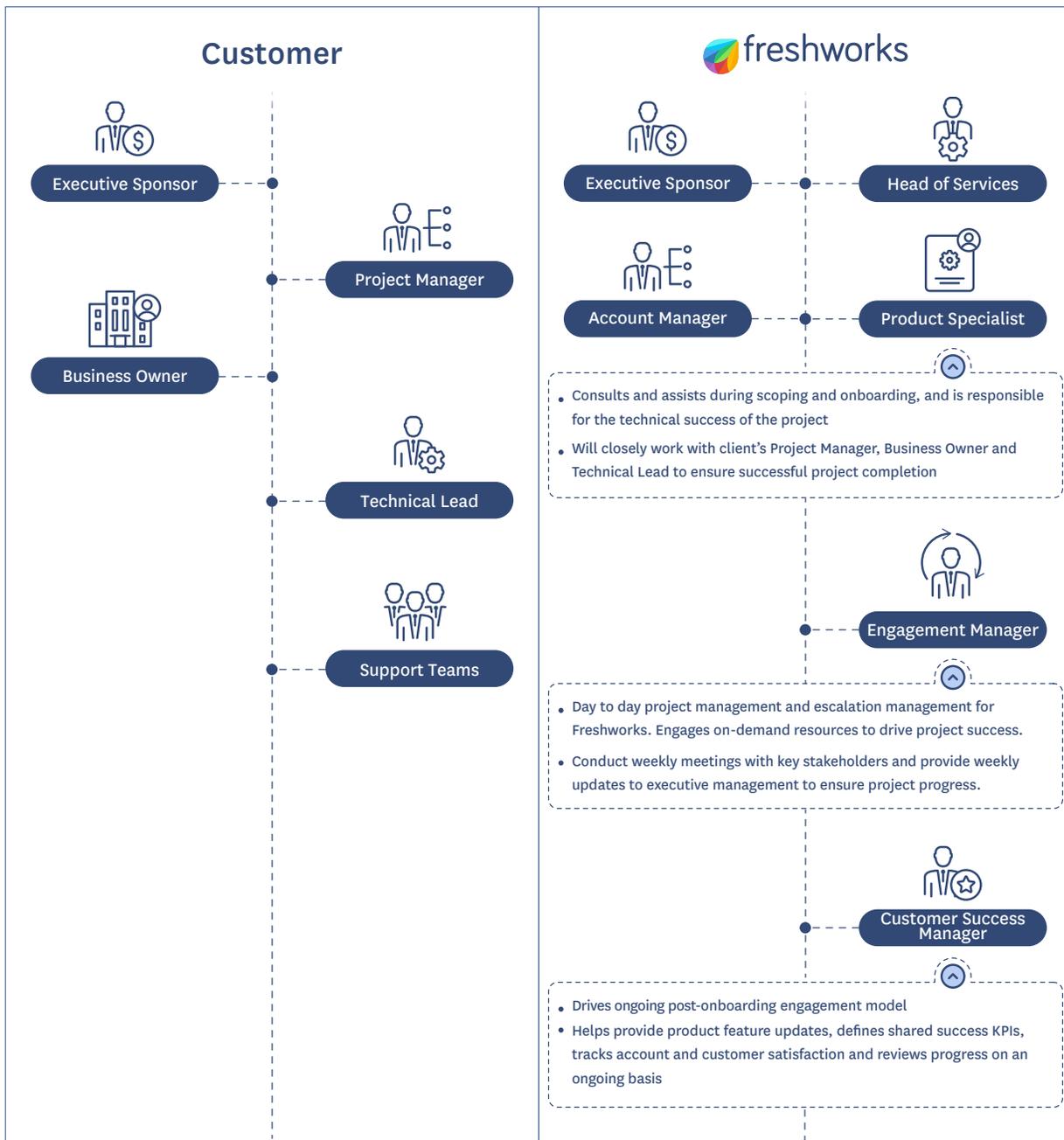
**Handoff and Wrap-up**

- Confirm go-live readiness and do a project wrap-up and hand-off with the relevant stakeholders on your side
- Transition to Freshworks in-region customer success and global support teams to ensure ongoing support

*Primary Ownership: Joint*



# Engagement Model - Gold Plan





## Agile Influenced Methodology

We use an Agile aligned methodology for delivery which also takes in some best practices for project management from the waterfall model of delivery. This approach helps us manage risks and also deliver on time and on budget.

Additionally, for any software development required in terms of custom app development or 3rd party integrations, we use the Agile influenced methodology for the onboarding process. We deliver the scope of the project in two-week sprint cycles. A tentative sprint outline is prepared to help gauge the timeline (and total number of sprints) to complete the onboarding effort. This methodology allows us to focus on the features and requirements most critical to the business and deliver a working and thoroughly tested Freshworks solution.

Each two week sprint is structured as follows:

- Sprint planning meeting, to pull stories based on priority from the backlog and determine each story's complexity by recording a story-point
- Determine and execute story tasks
- Daily stand-up meeting, to review past-day accomplishments, current day plan and raise any impediments
- Mid-sprint checkpoint meeting, to ensure we can handle the stories outlined in the sprint, and if not, move stories that cannot be implemented to the next sprint
- End of sprint demo, to show the stakeholders progress i.e. working code and configuration
- Sprint retrospective meeting, to gather lessons learned, what worked, what did not and to adjust strategy accordingly for the following sprint

## Considerations for Successful Onboarding

- Customer will identify a point of contact to take ownership of configurations and champion the product internally as required
- Freshworks will work collaboratively with your assigned points of contact / technical lead to ensure project scope remains consistent and issues are resolved on a timely basis
- Any 3rd-party integration points and use-cases need to be well-defined and will be shared with Freshworks at the start of project
- There are no technical dependencies on third party systems or API limitations to retrieve any historical data required for migration

[Not sure if Gold plan will work for you? Please check out our other onboarding plans or reach out to your account executive who can help find the plan just right for you.](#)