

Freshworks Onboarding Solutions



Jumpstart your journey towards best-in-class sales enablement

Sales Enablement Suite - Platinum Plan

Platinum Plan Summary

- The Platinum Plan is ideal for you if you have a complex technical environment or you plan to use advanced features that require proactive engagement and advanced assistance with Freshsales.
- Advanced assistance, our enhanced implementation methodology involves a framework-driven along with core components to deliver outstanding services to you that are customized to your technical and functional needs.
- The plan includes a named Sr, Product Specialist, an engagement manager who will coordinate with your project teams, and a solution architect to 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. 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

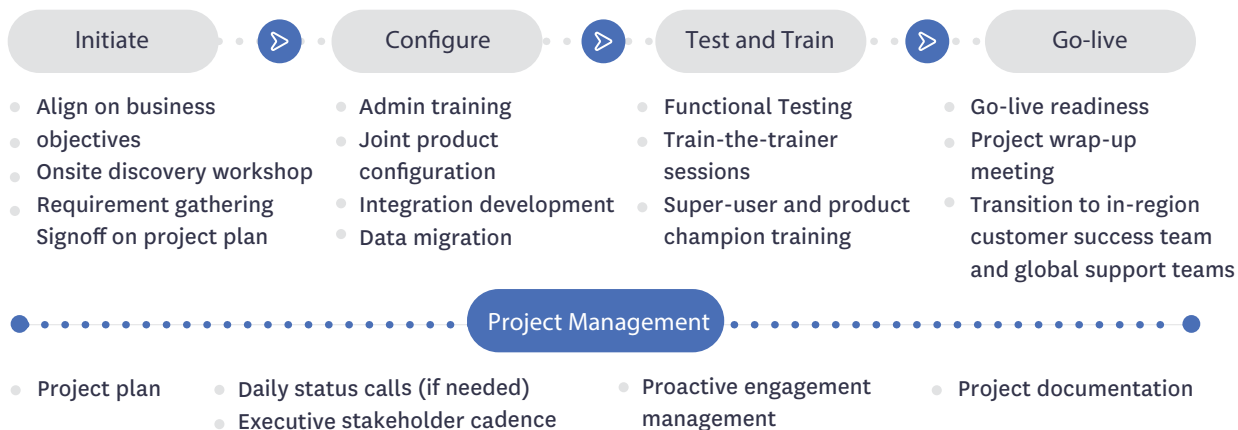


Stress Free Transition

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 a successful and no-risk go-live. Major outcomes of this phase are gathering all requirements, defining scope and objectives, outlining key project activities along with roles and responsibilities, and training your system administrators and product champions on the configuration process.




 <p>Project Kick-off Call</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>Primary Ownership: Joint</p>
 <p>Requirements and scoping workshop</p>	<p>Remote workshop to review business processes, use-cases, integration requirements and migration needs.</p> <p>Primary Ownership: Joint</p>
 <p>Project Plan</p>	<ul style="list-style-type: none"> 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). Weekly meetings to ensure keep the onboarding on track by sharing status updates and addressing any issues or project risks/blockers <p>Primary Ownership: Freshworks</p>
 <p>System Administrator Training</p>	<p>Administrator training for system admin and product champions. The admin training will cover out-of-the-box configuration and will equip your team with the knowledge to maximize the potential of the solution.</p> <p>Primary Ownership: Freshworks</p>



2. Configuration and Develop Phase

Freshsales is easy to configure, set-up, learn and maintain. We will follow a hands-on approach to configuration and help you configure the workflows that you require, based on our best practices from thousands of successful implementations. We will assist the right subject matter experts on your side to learn the product while continuing to consult and advise you with configurations.

We will organize joint configuration sessions (onsite) to ensure alignment between our best practices and your functional/technical requirements. Our Sr. Product Specialist will work with your management and admin team to strategize how the identified requirements can be enabled using the product functionality.

 Configuration	<ul style="list-style-type: none">• Joint configuration sessions to ensure alignment between best practice and functional/technical requirements Weekly• defined sprints between Freshworks product specialist and customer system administrator Primary Ownership: Joint
 Integration Development	<ul style="list-style-type: none">• Freshworks will work with you to define the scope of integration.• Where custom integrations are required (which are not part of our app marketplace) Freshworks will introduce a system integrator from our partner network to help develop, test and deploy Primary Ownership: Freshworks / System Integrator (SI)
 Data migration	Migration of up to 200,000 records Primary Ownership: Joint

Typical configurations in Platinum Plan

Freshsales

- Email & phone setup
- User, territories and lead assignment
- CRM customization including adding fields, lead/deal stages, sales pipelines, lost reasons
- Website integrations, event tracking (in-app and website)
- Lead scoring
- Web to Lead/Contact forms
- Workflows Automation
- Sales Campaign
- Data Dedup

Optional add-ons

- Freshchat
- Freshcaller



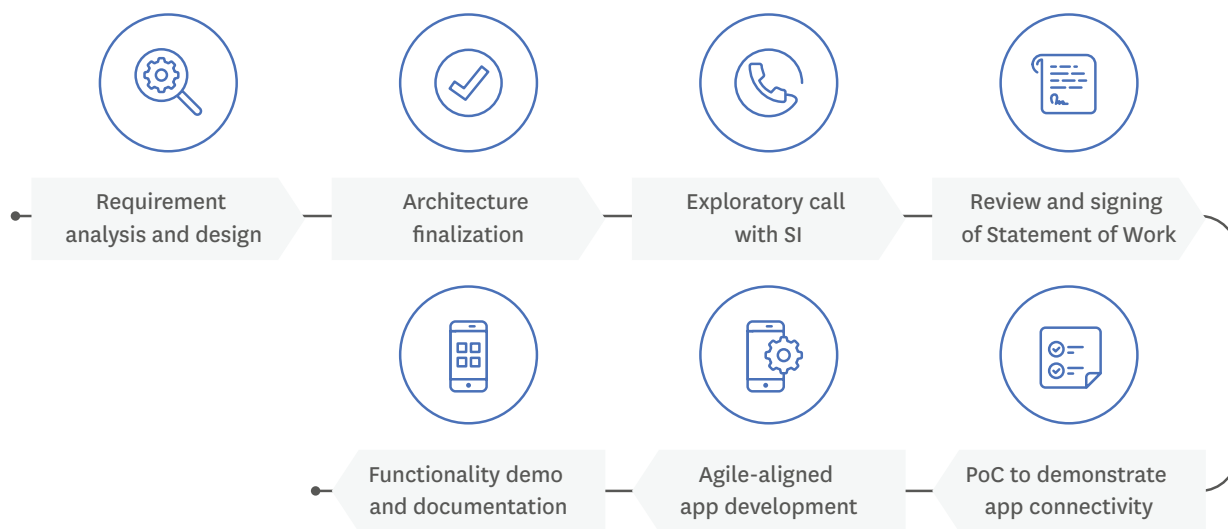
Integration Development

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

Custom Apps and Integration

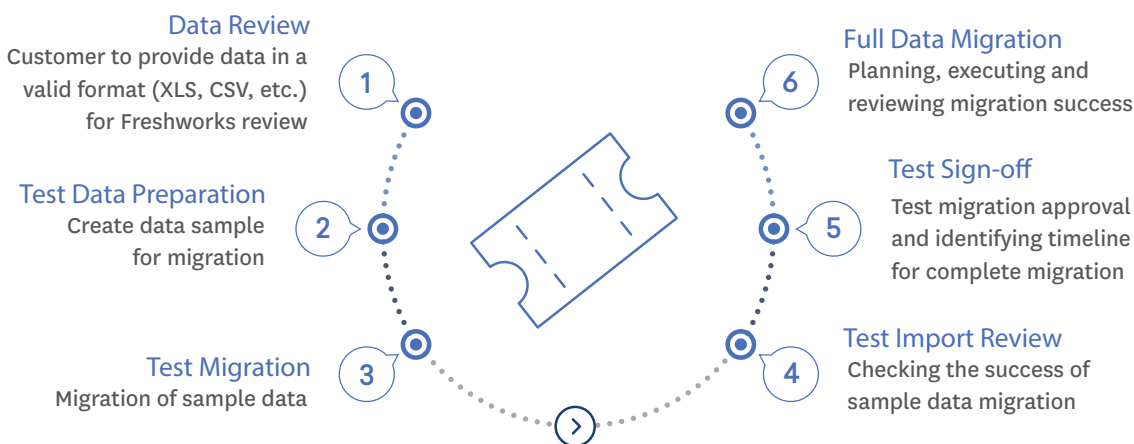
In case of unavailability of a Marketplace app, we typically engage either our in-house development teams or one of our trusted System Integrator (SI) partners to develop the app or integration.

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 Platinum plan offers you migration of up to 200,000 records subject to the following guidelines:




If necessary, additional migrations over 200,000 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 Freshsales implementation and provide you with key resources that will ensure your success. As a part of Platinum plan, we will offer you training sessions 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



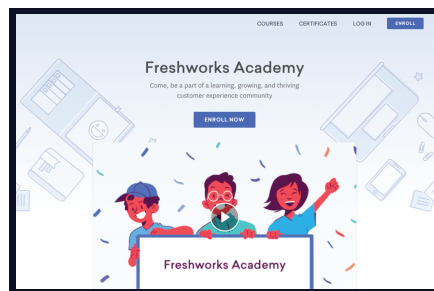
Training

- 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

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.



4. Go-live Phase



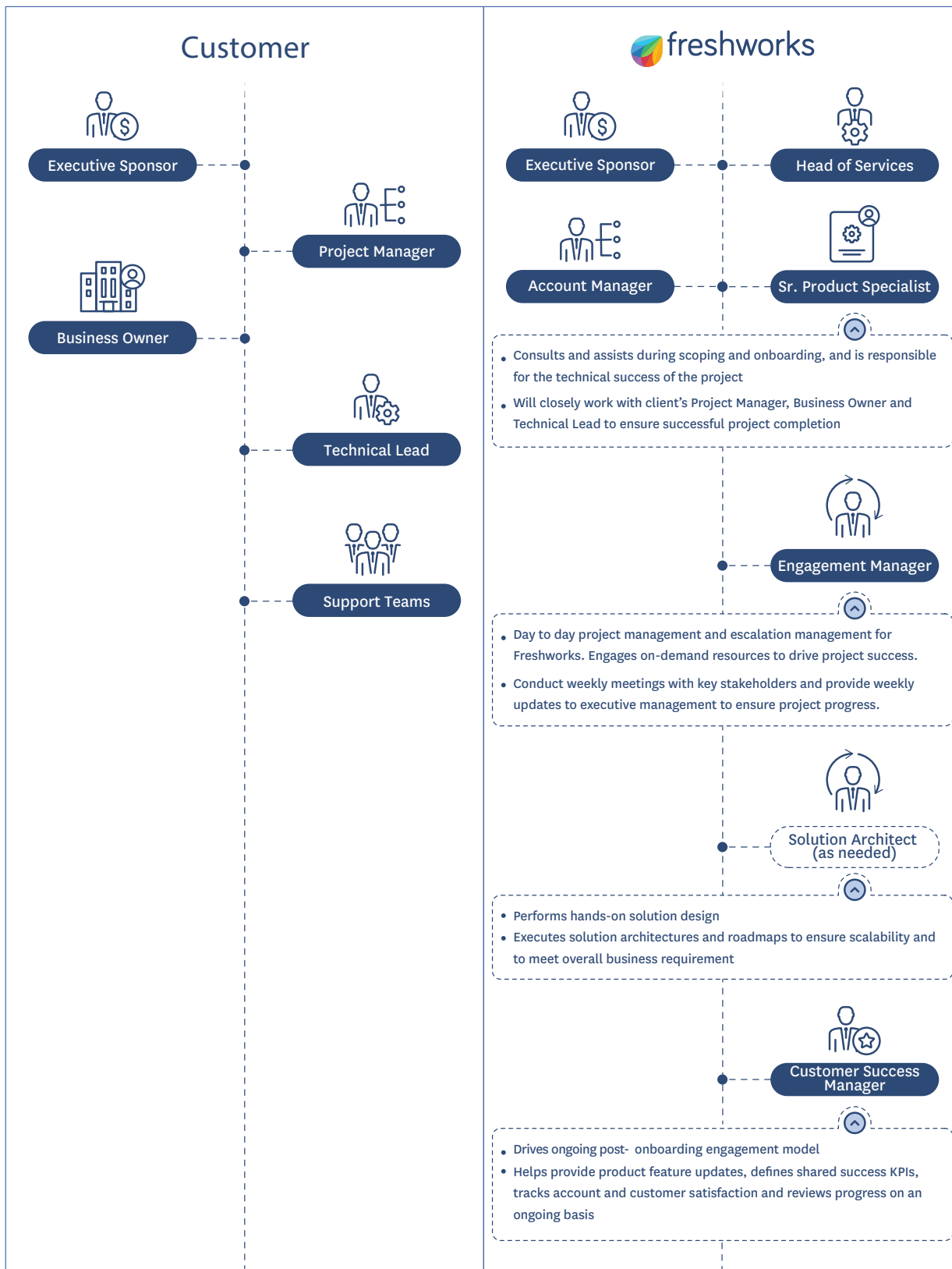
Handoff and Wrap-up

- 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 - Platinum 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

In case you have a large number of agents, or a complex technical environment that you think may not be covered within the Platinum plan, we also offer an Enterprise package that can be customized to your needs. This package includes everything covered in the Platinum plan and can be customized based on on-site days required, data to be migrated and the scope of integrations.

Please get in touch with your account executive to know more.