

# Freshworks Onboarding Solutions



Jumpstart your journey towards best-in-class CRM product enablement

## Silver Plan

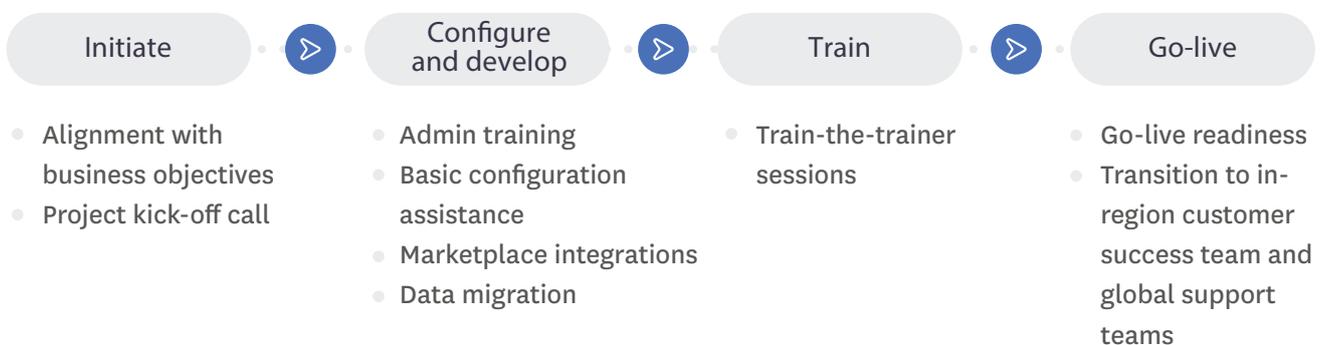
### Silver Plan Summary

- The Silver Plan is ideal for you if you have a strong internal team that can configure the solution and are just looking for basic assistance with setting up your Freshworks products quickly.
- This plan includes a named Product Specialist who will assist your technical team throughout the onboarding process as they configure the solution.
- This usually involves a project kick-off call and follow-up Q&A sessions to help answer any technical queries that you might have during the configuration phase.
- 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.

### Plan Overview





## 1. Initiate Phase

 <p>Project Kick-off Call</p>	<p>Align customer and Freshworks' teams to define project objectives, scope, expectations and requirements</p> <p>Primary Ownership: Joint</p>
 <p>System Administrator Training</p>	<p>Administrator training for system admin and product champions covering system configuration and maintenance and knowledge to maximize the potential of Freshsales</p> <p>Primary Ownership: Freshworks</p>

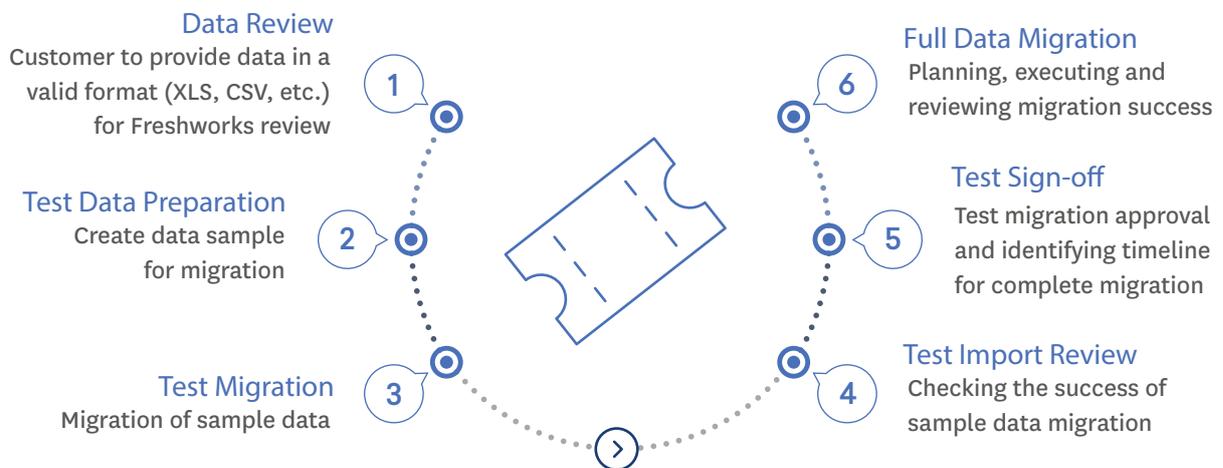
## 2. Configuration and Develop Phase

 <p>Configuration</p>	<ul style="list-style-type: none"><li>• Q&amp;A sessions</li><li>• Basic assistance and guidance with out-of- the-box configurations</li><li>• Weekly calls between your team and the Freshworks product specialist</li></ul> <p>Primary Ownership: Customer</p>
 <p>Integration</p>	<p>Help with the set-up and integration of Freshworks Marketplace apps</p> <p>Primary Ownership: Joint</p>
 <p>Migrations</p>	<p>Migration of your data records</p> <p>Primary Ownership: Joint</p>



- Freshsales 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 configure the product while continuing to consult, advise and help you configure the workflows that you require.
- This is usually achieved via a series of Q&A sessions to help address any queries you may have for all out of the box configurations.
- We will keep training the admins as they configure the product and provide assistance as needed. We will also share best practices including access to online documentation.
- We will assist you with the set-up and integration of Freshworks Marketplace apps with your Freshworks instance. Marketplace offers a wide selection of apps that can be configured in a matter of minutes. We will also share the relevant solution articles for the selected Marketplace integrations.

## Data Migration





### 3. Train Phase



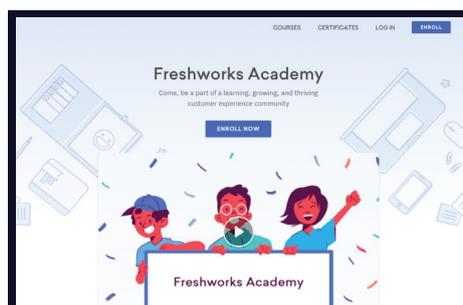
#### Agent Training

- Follows Train-the-trainer model
  - Super-user and product champion training that can be cascaded down to agents and end-users by customer
  - Provide standard Freshworks training documentation for admins, agents, and end-users
- Primary Ownership: Joint

- This phase focuses primarily on training following the train-the-trainer model. As a part of Silver plan, we will offer one remote training session (not exceeding 2 hours) to the system administrator an/or product champions identified by you.
- Our training programme and content ensures that we enable key admins to get the most out of Freshworks products and work in ways that are easy to understand, apply and ultimately, contribute to getting the agents becoming fully hands-on and productive.
- We will offer additional training if requested by you which will be chargeable on a time and material basis.

#### Resources

In addition to training sessions, you also get unlimited online access to Freshworks Academy to stay up to date with our offerings.



### 4. Go-live Phase

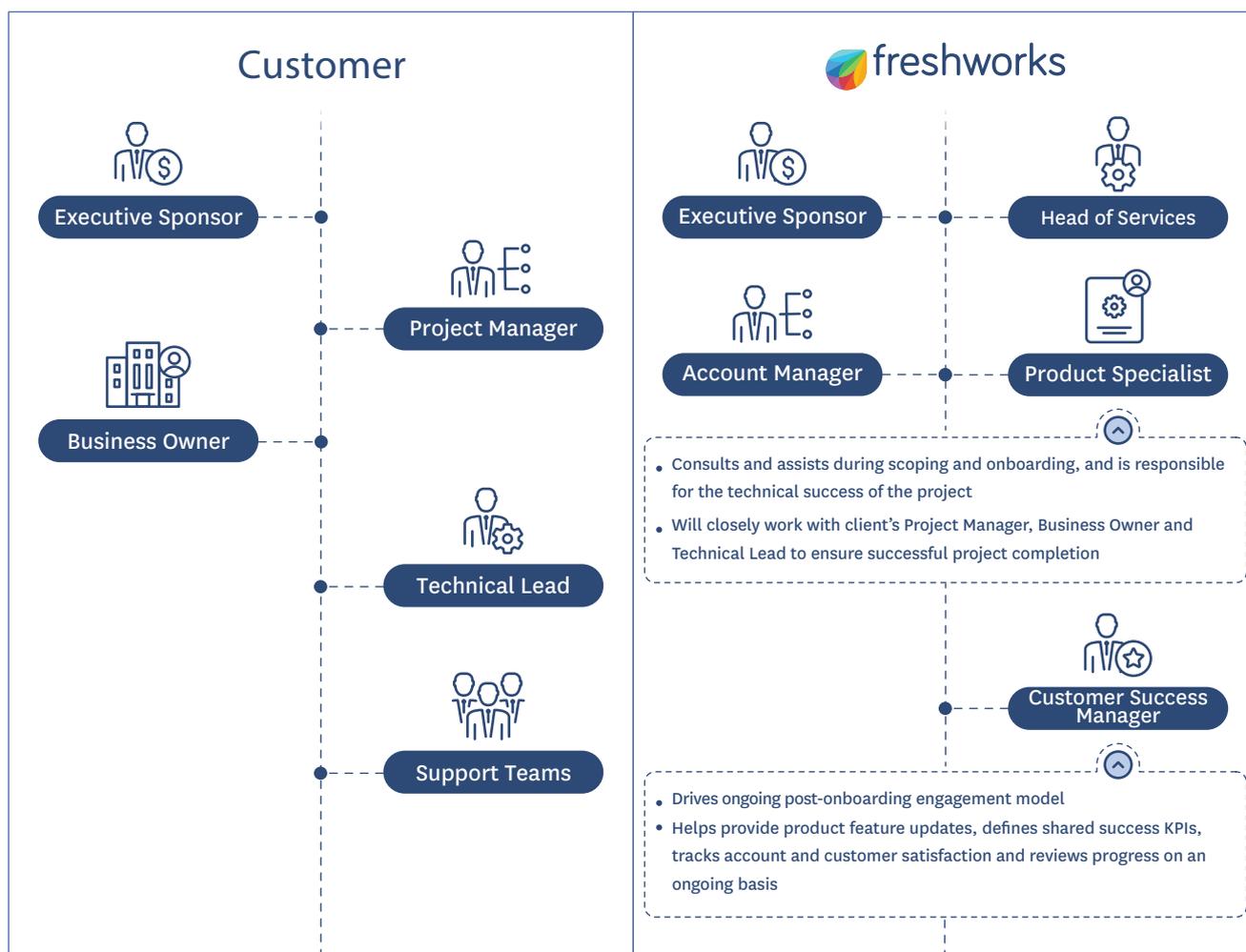


#### Handoff and Wrap-up

- 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 - Silver Plan



## 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 Silver 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.