



# CONVERCENT IMPLEMENTATION OVERVIEW



Convercent has an unshakable commitment to the people we work with. With the help of a dedicated Customer Experience Manager, most of our customers can be up and running in just a few days or weeks (not months). Your dedicated Customer Experience Manager will work with you to develop and maintain a custom implementation plan that aligns with your unique requirements while ensuring your organization realizes quick successes and business value.

The Convercent implementation team is comprised of product development, IT and customer care specialists to ensure a seamless onboarding across four main project phases.



# IMPLEMENTATION APPROACH: FOUR PHASES

## 1 Strategy and Planning

Includes project kickoff, team introductions, project overview, timing/milestones, and requirements definition for product, telephony and legacy data migration. A project plan will be assembled to help facilitate the change management process within your organization, including considerations and best practices for rollout and communications based on your organization's culture, resources and how new technology is typically introduced.

### Team Resources

It's recommended that all team members that will be involved in the implementation and management of Convercent attend the strategy and planning discussions, which may include:

- Executive sponsor: To communicate and reinforce why Convercent was purchased, the business value of the system and the broader goals and objectives of the system.
- Administrative users: To understand their role in implementation, to act as organizational subject matter experts and help guide the creation of the project timeline.
- IT resources: To help with hotline telephony requirements, legacy data migration, single sign-on configurations and/or integration with other systems.

### Convercent Deliverables

- Detailed project plan
- Change management strategy



### 2 Configuration and Testing

Includes product configuration training, setup and testing. Depending on your organization's needs, this may also include HR data upload, legacy data import, telephony configuration, single sign-on setup and system integration activities.

#### Team Resources

- Executive sponsor: To ensure the project team is on track with goals, objectives and timelines and that product configuration is meeting the initial goals/objectives.
- Administrative users: To aid configuration training, setup and testing activities.
- IT resources: To assist with any advanced configuration and testing activities related to single sign-on and system integrations.

#### Convercent Deliverables

- Configuration training
- Application configuration
- HR data load
- Legacy data import
- Telephony setup
- Single sign-on configuration
- Test plan sign-off



### 3 Product Training

Includes product training for the day-to-day administrative users of the Convercent application. We are dedicated to the success of our customers and have flexibility in our training delivery, which may include onsite or web-facilitated sessions.

Convercent additionally offers all administrative users access to the customer support portal. The support portal is an online repository of onboarding reference materials, knowledge base articles and training assets.

#### Team Resources

- Executive sponsor: To offer support as needed, ensure tracking against goals and undergo any training needed to facilitate administrative and oversight needs.
- Administrative users: To undergo training as the primary and power users of the Convercent application.

#### Convercent Deliverables

- Comprehensive product training
- Full access to customer support portal



### 4 Communication and Rollout

Change management can be tough, but we'll make sure you don't go it alone. We offer each customer assistance and insight on their rollout and communication strategies to help facilitate a seamless transition and launch.

#### Team Resources

- Executive sponsor: Collaborate with Convercent and company stakeholders to refine and execute communication strategy, system rollout and go-live activities.
- Administrative users: Offer operational and tactical support to executive sponsor for rollout and launch as needed.

#### Convercent Deliverables

- Communication strategy
- Product launch



# CHANGE MANAGEMENT STRATEGY

PREPARE FOR CHANGE

## 1 STRATEGY & PLANNING

Change Management Plan Considers:

- Company culture
- Approval processes
- Existing business process
- Existing technologies
- Success criteria, desired outcomes, timelines

MANAGE CHANGE

## 2 CONFIGURATION & TESTING

Process & Technology Changes Include:

- Map business process changes
- Map technology changes
- Convercent configuration and alignment with new processes and technology changes
- Testing
- Approvals and signoff

## 3 PRODUCT TRAINING

Training Includes:

- Training staff on new business processes and technology changes
- Training and exposure to support services and contacts

## 4 COMMUNICATION & ROLLOUT

Process Transitions Include:

- Execute communication plan
- Rollout of new services and enhanced business processes

REINFORCE CHANGE

## ★ SUCCESS CHECKPOINTS

Change Management Review Includes:

- Collecting and analyzing feedback
- Implement corrective actions
- Celebrate successes



## WE'RE COMMITTED TO YOUR SUCCESS

### Dedicated Customer Experience Manager

Working together to develop a custom implementation plan that meets the unique needs of your organization. Includes personalized training and support.

### Customer Support Portal

24/7 online access to training and support assets including online knowledge base, product reference guides, workflows and templates.

### Customer Success Help Desk

Convercent's team of technical experts assisting you and your employees with questions as they arise post-implementation. Easily accessible by phone, email or via the customer support portal.

**30-60-90 DAY**

Post-implementation success checkpoints

**2 HOURS**

Average response time to all help desk support requests

**80/20**

80% of ethics hotline calls answered in 20 seconds or less

**9 MINUTES**

Average ethics hotline talk time

**5% OR LESS**

Average ethics hotline abandon rates



Convercent's risk-based global compliance solution enables the design, implementation and measurement of an effective compliance program. Delivering an intuitive user experience with actionable executive reporting, Convercent integrates the management of corporate compliance risks, cases, disclosures, training and policies. With hundreds of customers in more than 130 countries—including Philip Morris International, CH2M Hill and Under Armour—Convercent's award-winning GRC solution safeguards the financial and reputational health of your company. Backed by Azure Capital, Sapphire Ventures (formerly SAP Ventures), Mantucket Capital and Rho Capital Partners, and based in Denver, Colorado, Convercent will revolutionize your company's compliance program.

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