**INFOSHEET**
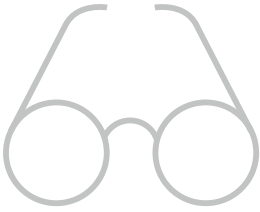
# Express Onboarding
## Online

## Delivery method and duration

The Projectplace Express Onboarding is delivered by an experienced implementation consultant. The Express Onboarding consists of 10 hours' worth of online workshops during which the customer is provided with consulting and enablement training. The consultant will take a consultative approach to help the customer envision and build out company processes in Projectplace. Member and administrator enablement training on the tool will be customized to the customer's needs and processes and adjusted to number of resources to be onboarded.

## Assumptions

- The customer will assign a **project owner** (Projectplace account administrator) to act as the main point of contact. This person will carry the responsibility for scheduling enablement training for other customer resources.

- The project owner will organize groups with a maximum of 15 resources to participate in the enablement training workshops.

- The customer will identify project managers and other resources who will have a say in how the customer process(es) will be set up in Projectplace.

- The customer is responsible for providing information about their work process(es), preferred project template(s) and their portfolio KPIs.

| Parties involved | Agenda | Estimates |
|---|---|---|
| **Project kick-off** | | |
| Planview; Projectplace consultant<br><br>Customer; project sponsor, account owner/ administrator(s) | • A quick overview of Projectplace and Planview<br>• The customer's needs and experience level<br>• The content of the Express onboarding workshops<br>• The Express Onboarding plan and timeline<br>• Go-Live-Date<br>• Discussion on customer involvement<br>• Projectplace Express Onboarding workspace | 1 hour |
| | **Outcome** | |
| | • To have the Express Onboarding workshops scheduled<br>• Identification of customer resources who will join which workshops<br>• Access for the customer core team to the Express Onboarding workspace | |

| Parties involved | Agenda | Estimates |
|---|---|---|
| **Account administration** | | |
| Planview; Projectplace consultant<br><br>Customer; Projectplace account administrator(s) | • Enablement training on account administration<br>• Introduction of Projectplace tools above workspace level<br>• Identification of Projectplace tools necessary to support customer process(es) | 1 hour |
| | **Outcome** | |
| | Account administrator(s) will be able to:<br>• Navigate the account administration section<br>• Manage account settings<br>• Manage account users and access rights<br>• Manage requests<br>• Manage portfolios<br>• Work with the workload tool<br>• Navigate templates | |
| **Process Consulting** | | |
| Planview; Projectplace consultant<br><br>Customer; Project Sponsor and experts on company process(es) | • Discussion on customer process(es) around project management and/ or BAU work<br>• Advice on how to build these processes in Projectplace<br>• Building templates in Projectplace which support customer process(es)<br>• Building out other parts of the tool such as roadmaps, request forms, portfolios including KPI's and teams if applicable | 2 hours<br><br>hands-on consultancy |
| | **Outcome** | |
| | • A clear understanding of how Projectplace will support the customer's work process(es)<br>• A clear understanding of what a. o. a portfolio, a request, a roadmap, a workspace, an activity, a milestone, a board, a card, a folder, a document, a team and a group will represent in the customer process(es)<br>• The draft of one workspace template and the ability to complete it outside of the workshops<br>• The draft of roadmaps, request forms/ portfolios with KPI's and teams if applicable and the ability to complete them outside of the workshops | |
| **Workspace administration** | | |
| Planview; Projectplace consultant<br><br>Customer; Project manager(s) and work administrators | Enablement training on:<br>• Navigation in Projectplace<br>• How to create/ manage workspaces<br>• How to create/ manage templates | 2 hours |
| | **Outcome** | |
| | • Understanding the principles of collaborating in workspaces<br>• The ability to create, customize and administrate workspaces<br>• The ability to manage access rights and create a workspace plan<br>• The ability to customize boards and to build a document structure<br>• The ability to track project progress<br>• The ability to create and manage templates<br>• The ability to create and manage teams<br>• The ability to report status to Projectplace portfolios<br>• The ability to export a time report | |

| Parties involved | Agenda | Estimates |
|---|---|---|
| **Member enablement** | | |
| Planview; Projectplace consultant<br><br>Customer; Project members | Enablement training on:<br><br>• Navigation in Projectplace<br>• How to update user account settings<br>• How to install the desktop application<br>• The Personal & the team overview<br>• How to work in a workspace<br><br>• Exercises (optional) | 2 hours hands-on consultancy for 12-15 resources<br><br><br>1-hour workshop |
| | **Outcome** | |
| | • Understanding the principles of collaborating in workspaces<br>• The ability to navigate from the personal overview, to workspaces, to personal user settings<br>• The ability to communicate within Projectplace<br>• The ability to work with boards and cards<br>• The ability to manage work<br>• The ability to work with documents<br>• The ability to report time | |
| **Follow up and wrap-up** | | |
| Planview; Projectplace consultant<br><br>Customer; Project managers and account administrator(s) | • Review of customer process(es) build in Projectplace<br>• Make small adjustments to templates or other parts of the tool, if applicable<br>• Q&A after having worked in Projectplace for a while | 1 hour |
| | **Outcome** | |
| | • All outstanding questions answered<br>• Customer live with Projectplace | |

## Free enablement webinars

Aside from providing customized consulting and enablement training, Planview also delivers free enablement webinars on a monthly basis for its entire customer base.

You can sign up for these webinars at **success.planview.com/Planview_Training_Services**

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