



## Standard Implementation

Once you choose iCarol as your helpline software, we want to ensure a smooth transition from your trial to implementation. That's why we offer comprehensive implementation with your initial iCarol subscription.

### What's included:

#### Your Implementation team

- You will be assigned a Client Support Implementation Specialist (CSIS) during your entire Implementation Period (usually the same Support Team member that assisted you during trial)
- Communications using our convenient in-app case management system to better track each phase of your Implementation
- Quick calls with your assigned CSIS to help clarify questions when appropriate



#### How this will all work

- Your assigned CSIS will setup separate cases to guide you through the steps necessary to customize your iCarol system. These typically include:
    - Delete Demo data from base system
    - Set-up volunteers and staff
    - Set-up shifts
    - Create/customize call report forms
    - Set-up resources
    - Additional cases depending on any other features subscribed to
  - You will receive an email when each case is set-up
  - Follow and respond to your cases in your iCarol Online Case Management System to ensure each feature is set-up to best meet the needs of your helpline
- Most new clients complete implementation within 30 days of requesting their first invoice (if we receive all information needed in a reasonable time period, which is usually one-two days from request); if Add-ons are subscribed to, it may take up to 4-6 more weeks to fully implement the additional features



#### Contents of cases

- In each case, your assigned CSIS will:
  - Explain and/or direct you to information explaining each feature
  - Ask questions to best help assist you in customizing the feature to meet your needs
  - Offer a Training Plan to help you and your staff learn how to use each feature

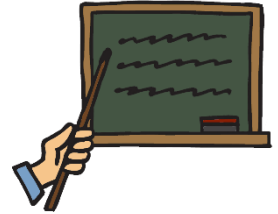


Think you may need support beyond what's listed here? Ask us about our enhanced options and professional services offered by our staff.

Current as of 2018 05 3

### **In-app help and training**

- Training Plans will be provided along the way to help you and your staff best learn how to use each iCarol feature
- Those that have the best success – Self Train! You have at your fingertips:
  - Dozens of tutorial videos on iCarol features
  - Hundreds of help articles with step-by-step instructions
  - Recordings of detailed training webinars
  - Tips and tricks shared on the Admin Dashboard
  - Access to the iCarol Community
- In a Trial and want to start with a Training Plan now?
  - Click Help from your left hand menu
  - Click 'Help Articles' at the top of the page
  - Type 'Training Plan' in the search box and click the 'Search' button
  - Click the Training Plan for the feature you want to learn about



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