100 Day Onboarding Plan

WHAT IS THE CLIENT SUCCESS ONBOARDING JOURNEY?

VALD has a large Client Success team that provides our clients with expert support for applied system use and ongoing learning and development.

During the first 100 days with VALD, new clients are proactively engaged in onboarding activities by a Client Success Manager (matched with clients based on expertise, experience, and geography) who use their applied knowledge to execute implementation solutions to help our clients derive value from their system/s. These engagements often come in the form of emails, virtual meetings, webinars, and in-person site visits; however, we are guided by our clients and their goals.

WHAT CAN CLIENTS EXPECT DURING ONBOARDING?

✓ Personalized guidance to fit their organization's needs

✓ Detailed implementation and advanced usage resources

✓ Open, two-way communication with your Client Success Manager

✓ Continued professional and personal development opportunities

✓ Expertly led webinars and tutorials

✓ Access to our specialized support team for technical issues

WHAT DOES 'THE FIRST 100 DAYS' LOOK LIKE?

STAGE 1

GETTING STARTED (WEEKS 1 – 3)**:**

Clients are provided with the necessary information to get started with their VALD system/s and are connected with their Client Success Manager. Clients will also receive:

✓ Access to VALD Hub and other applicable software

✓ Starter Guides and use of VALD's Knowledge Base

✓ Support to start testing!

STAGE 2

FOUNDATIONAL KNOWLEDGE (WEEKS 3 – 6):

Clients are supported to further understand and integrate their system/s into their unique business context. Clients are guided through an onboarding call with their Client Success Manager to step through important system processes such as:

- ✓ Testing protocols
- ✓ Managing Profiles and reporting in VALD Hub
- ✓ Managing Groups and Categories in VALD Hub
- ✓ Integrating available PMS/AMS software

STAGE 3

WORKFLOW REFINEMENT (WEEKS 6 - 9):

Client Success Managers take this opportunity to check in on the client's onboarding progress to ensure they are deriving value from their system/s. Through email correspondence or an additional onboarding call, the client will be supported to:

- ✓ Refine their integration of the new VALD systems within their business context
- ✓ Ensure all users in the business are upskilled in advanced testing practices and protocols
- ✓ Resolve workflow adoption challenges

STAGE 4

ADVANCED APPLICATION (WEEK 9 – 12):

The final onboarding stage is a client-led engagement with their Client Success Manager to ensure that the client feels confident with system usage. This stage will be based on the client's needs within their business context.

WHAT HAPPENS NEXT?

Following the first 100 days, clients will be proactively supported by their Client Success Manager through regular engagements to ensure they continue to derive value and advance the application of their VALD system/s.