



An overview of the ZyLAB ONE SaaS onboarding program

# Onboarding Guide

# Customer Success

For 35 years, ZyLAB has enabled countless corporations, governments and law firms to make smart decisions based on facts. On a daily basis, more than 3 decades of experience are applied to service our clients globally. We understand that your success is fully depending on the successful use of our solution and we are dedicated to help you achieve just that.

## **Mutual investment**

A fresh new start can only be successful when two parties join forces. It is essential that your users have a solid understanding of the rich functionalities that are made available through ZyLAB ONE. An initial investment in time to ensure staff gets up to speed in the first month will ensure higher levels of success in the longer term.

As a new customer, you will be assigned a Service Delivery Manager who will be working alongside you, ensuring operational coordination of all onboarding and start up activities. In turn, we kindly ask that you assign a project manager to help coordinate onboarding activities and resources.

Together, this team will ensure a smooth start and execution of the first and future projects.



# Starting off on the right foot

The onboarding stages are defined as follows:

## **Kick-off and orientation**

In the Kick-Off and Orientation meeting you will be introduced to the Customer Success team and the procedures around how to get assistance and where to find specific information. In this meeting, your requirements and deadlines will be discussed. In parallel, we will demonstrate the use of ZyLAB ONE for your project, review your workflow and recommend best practices.

## **Provisioning**

ZyLAB ONE is designed to address several use cases. After the Kick Off and Orientation meeting, your requirements are shared with the technical team who will prepare your ZyLAB ONE solution by loading the required templates that determine the behavior of the application to meet your requirements, such as processing, auto-classification, tagging, workflow and production. Where required, ZyLAB may configure your environment to integrate with your Azure Active Directory, allowing a Single Sign-On experience.



## Training and support

### *Introduction training*

Prior to Go-Live, one of our consultants will organize a training session in which the application is demonstrated. In addition, we strongly recommend users obtain a basic understanding of ZyLAB ONE by following our online onboarding videos and documentation. These help enable your team to successfully use the application and reduce dependency on ZyLAB Consultancy.

### *Online training*

ZyLAB ONE users will get access to our online learning management system, this allows them to continue to learn about ZyLAB One and, if they wish, take advantage of our certification training and exams.

## Progress monitoring

During the first month of your first project, our success team will maintain contact with you on a regular basis to overcome any hurdles you may come across or to answer any question you may have. In addition, the team will keep a close eye on any support ticket you may raise and provide internal and external guidance.

## Go-Live

Upon go live, you will be transitioned to ZyLAB's regular Customer Support. The Service Delivery Manager and the Customer Success team will continue to closely monitor your use of ZyLAB ONE and will help you quickly become productive.

## Additional assistance required?

Should you require additional support during the go-live period or beyond, a dedicated resource may be engaged.

## Technical Support

From the very start our Customer Support team is available to make sure your ZyLAB ONE solution is online and configured to meet your needs. They will also help resolve any issue you may experience.

Access to online documentation, training videos and other support resources such as ZyLAB's online ticket management system that allows users to log, update and manage their support issues, is available 24 x 7.

Live Customer Support services are provided during regular support center business hours, 8:45am – 5:45pm and consists of:

- Clarification of software functions and features
- Basic guidance in the operation of ZyLAB ONE
- Error verification and analysis
- Data services that include the creation and deletion of matters, loading native data, loading standard load file data (including mapping), guidance on data collection and processing strategies.

For critical incidents after business hours, an on-call support service is offered. A representative on duty will respond via the ticketing system.

### **Professional Services**

Our experienced team of professionals can provide Consultancy Services and Project Management services whenever you require.

Professional Services activities will be provided at incremental cost, billed and payable per hour (billed in 30-minute increments), against ZyLAB's then current fees for such services, unless otherwise agreed in the applicable Order Form.

Examples of consultancy and project management services include, but are not limited to:

- Review workflow development and use case strategy consulting;
- Searching and culling strategies;
- Production best-practice consulting;
- Custom Reports;
- Status calls and reports as needed by case team
- Custom Training and Workshops
- Manipulation of complex data
- Cloud Collection;
- On-Premises Collection;
- Advanced load file configuration and manipulation;
- Matter Template Customization;
- Complex query creation;
- Overlay Support;

- Configuration services and consulting for Assisted Review and advanced analytics;
- Development custom entities for extraction;
- Develop custom queries for automatic document classification;
- Transmission of Production to 3rd Party;
- Custom productions.

**Ongoing Engagement - updates, newsletters & workshops**

We do not leave you unattended after go-live. Next to the continuous monitoring of our systems and usage, we will periodically engage with you to make sure you are fully aware of the latest developments and experiences. And be on the lookout for our Newsletters. In addition, periodic workshops will be organized that you can attend, free of charge!

## Let us know what you think!

Your feedback is extremely valuable to us. It will help to further improve our product and our services.

We may ask for your feedback periodically: right after the onboarding, after following the online training and when interacting with Customer Support.

### Services summarized

	ONBOARDING				GO LIVE	ONGOING ENGAGEMENT			
	Week 1	Week 2	Week 3	Week 4		Q1	Q2	Q3	Q4
<b>Kick off and Orientation meeting</b>	√								
<b>Introduction training</b>	√								
<b>Progress Monitoring</b>	√	√	√	√					
<b>Online certification</b>	√	√	√	√		√	√	√	√
<b>Quarterly Updates</b>						√	√	√	√
<b>Quarterly Newsletter</b>						√	√	√	√
<b>Quarterly Workshops</b>						√	√	√	√
<b>Technical Support</b>	√	√	√	√		√	√	√	√