



# GovOS Studio Onboarding Toolkit

2021 Services



# Begin with Onboarding

Your GovOS Studio subscription comes with an allotment of Professional Services hours that you can use for help with a variety of projects.

Because every government is different, we **highly** recommend you start by using some of your hours on the Studio Onboarding Scope of Work. This will walk your team through the process of discovering where to start, training your team, and launching your first forms.

In the following pages, we'll cover in detail what our Onboarding Scope of Work entails, from timelines to expectations. You'll see how we go from start to "onboarded", meaning your team has one process up-and-running and your team is trained to continue building and administering processes autonomously.

If you are looking to take one process live quickly, you can skip to page 9 to learn more about our Quickstart Onboarding.

If you'd prefer to forgo our Onboarding services, you can skip to page 10 to see a list of other services that you can use hours on.

## Did You Know?

- 80% of partners who follow the onboarding path are able to launch a new process in under a month
- Customer that choose the Quickstart package can launch a new process in one week

# Onboarding Timeline

The timelines below address a municipal wide rollout and training. While Studio can be used to stand up simple processes quickly, the most challenging part of digitization is change management. Our onboarding focuses on revisiting processes, training users to change the way they perform their tasks, and getting stakeholder buy-in.

## Team Hours

Four 1-hour Meetings: Planning, Kickoff, Rollout, Partner Business Review  
Two 1-hour Misc. Training Sessions  
Unlimited In-App Chat Support

## Approximate Timeline

2 weeks of planning and configuration  
2 weeks of discovery and team training  
2 weeks of form building and launch support  
8 weeks of executing on building forms to get your first 10 live!

## Expectations

2 weeks of planning and configuration  
2 weeks of discovery and team training  
2 weeks of form building and launch support  
8 weeks of executing on building forms to get your first 10 live!

# Onboarding Meetings

1

## Planning Meeting

1 Hour

A meeting with the administrative stakeholders to review the project plan, learn about users, and go over important goals.

2

## Kick Off Meeting

1 Hour

A meeting with all users to introduce Studio and kick off the training and discovery portions of the project.

3

## Roll Out Meeting

1 Hour

A meeting with all users to review and prioritize their forms and kickoff execution.

4

## Platform Training

2 Hours

An overview of the platform and all of its features for all users of the platform. You can use these meetings as needed.

5

## Partner Business Review

1 Hour

A review to determine next steps as you transition from on-boarding to support and continue on your partner journey with us.

Depending on your agency goals, resources, timelines, and complexity, it is common to add additional offerings to your standard onboarding package to ensure success.

# Onboarding Timeline

1

### Planning

- Set Timeline
- Align on Goals
- Build Team

4

### Training

All users will learn and gain expertise in the platform on their own. You have access to 2 hours of custom training with your success manager.

2

### Configuration

- Create and customize account

5

### Execution

Once you have selected your forms and completed training, you will be ready to build your first form and make it live.

3

### Discovery

- Audit forms and process
- Prioritize processes
- Discover Quick Win to Launch

6

### Operate / Optimize

- Solidify Your Process
- Communicate Success
- Invite Others to Join in Program
- Partner Business Review

Onboarding			Launch
Phase 1 2 Weeks	Phase 2 2 Weeks	Phase 3 2 Weeks	Phase 4 8 Weeks
Planning			
Configuration			
	Discovery		
	Training		
		Execution	
			Operate/ Optimize

# Checklist

## Planning

- Planning Meeting (All)
- Establish Timeline (All)
- Create Org Structure (Project Lead and Project Sponsor)
- Kickoff Meeting with Team (All)

## Configuration

- Account Creation (GovOS)
- Municipal Configuration (Project Lead)
- Create Team Accounts (Project Lead)
- Set up Service Center (Project Lead)
- Set up Add Ons (GovOS and Project Leads)

## Discovery

- Form & Process Audit (Project Lead and Director)
- Form Grading (Project Lead and Directors)
- Prioritization + Roadmap (Project Lead & Director)
- Selection, Process Timeline, & Assignment (Project Lead)

## Training

- University Assignment (Project Lead and Director)
- University Completion (Project Lead and Director)
- GovOS Studio Webinar (Project Lead and Director)
- Two, Hour Long Trainings (Project Lead and Director)

## Execution

- Rollout Meeting (All)
- Launch 1 Forms (Project Lead and Director)
- Launch 4 Forms (Project Lead and Director)
- Launch 10 Forms (Project Lead and Director)

## Operate/ Optimize

- Celebrate Wins (Project Sponsor and Project Lead)
- Business Review (Project Sponsor and Project Lead)

# Your Staffing Needs

One of the goals of a standard onboarding is to help our partners understand what resource it will take to get up and running.



**Project Sponsor**



**Project Lead**



**Builder**



**Analyst**

	<b>Project Sponsor</b>	<b>Project Lead</b>	<b>Builder</b>	<b>Analyst</b>
<b>Planning</b> Weeks 1-2	-1 hr Planning -2 hr Team Building	- 1 hr Planning - 2 hr Team Building - 1 hr Municipal - Configuration and Account Creation		
<b>Training &amp; Discovery</b> Weeks 3-4	- 1 hr Kickoff Meeting	- 1 hr Kickoff Meeting - 4 hr Training - 2 hr Coordinating	- 1 hr Kickoff Meeting - 6 hr Training - 2 hr Form Discovery and Grading	
<b>Execution</b> Weeks 5-6	- 1 hr Rollout Meeting	- 1 hr Rollout Meeting - 4 hr Coordinating	- 4 hr Building and Launch	- 2 hr Process buy-in and training
<b>Ongoing</b> Weeks 7-14	- 1 hr PBR and review meeting	- 2 hr p/week coordination - 1 hr QBR and review meeting	- 2 hr process buy-in and training	- 1 hr per week training and admin (as needed)

# How To Launch

You have created your form, added all your signatures, and set up routing to ensure the right person receives notification of submission. What's next? Your form is live, you just need to distribute it to your customers/team and start taking submissions.

## End User Testing

Fill out the form pretending you are an end user, make sure there are no mistakes or points of confusion.

## Admin/Approver Testing

Add yourself to the email routing as a test, and pretend to be the person receiving submissions. Make sure there are no mistakes or points of confusion!

## Internal Sign Off

What department director needs to approve that this process is ready to go live? Have they given their approval?

## Communication

How do we want to notify end users? Good communication will help stakeholders to know that they can now go digital! Write out your communication plan and get sign off from your director. Options may be:

- Posting on your website
- Posting on your intranet
- Email Blast
- Press Release

## Go Live!

Take the actions laid out in your communication plan, which will formally make your form live.



# Quick Start Onboarding

Quick Start Onboarding is targeted to bring one process live. Our team will work on form creation and workflow setup based on the requirements. Estimated time is 6 hours.

- 1 Partner provides requirements for the form (fields, potential automation requirements)**  
This information can be provided to SC during the call or via email.
- 2 Form Conversion (1-2 hour depending on complexity)**  
Our team will convert the form(s) and send them over to you for initial review. If the timeline for the onboarding is less than 48 hours, the review is done during setup call.
- 3 Workflow and Setup Call (2 hr)**  
This call is dedicated to setting up signers and notifications on the form(s). During this call we will also look into the backend and ways of managing submissions.
- 5 Test Phase**  
Your team will test form(s) and let us know if there are any questions or feedback.
- 6 Feedback and Configuration all (1 hr) (optional)**  
During this call we will update any settings based on a feedback.
- 7 Going Live with the Form and Feedback (1 hr) (optional)**  
Most of customization and testing will be done during the Workflow and Setup call, but If you have any questions or comments, we will schedule another call to make changes and finalize the form(s)

# Other Digitization Services

For all GovOS partners who purchase the design studio, you will be on a recurring services plan. Your subscription comes with an allotment of Professional Services hours that expire and renew each year. Professional Services Hours do not carry over year to year, but start over.

Hours can be used for the following:

1

## Form Conversion Services

Form Conversion, Data Conversion, Form Creation, Account Configuration, Product Configuration, Maintenance and Configuration Changes

2

## Training Services

Training, Training Materials Creation, Testing and the Leading of User Acceptance Testing Sessions, Launch Support and Launch Collateral Creation

3

## Workflow and Advisement Services

Business Process Re-Engineering, Project Management, Process Discovery, Operational Review and Optimization, Security and Audit Reviews, Integration Development, Custom Application Development.

# Add-On Pricing

## Services Add-Ons

Need more assistance? We are here to help. Let us know what additional services you may need.

SERVICES PACKAGE	DESCRIPTION	COST
<b>Standard Onboard</b>	Up to 6 hours of implementation and onboarding services	\$1,595
<b>Quick Start Package</b>	10 hours of professional services from a team of GovOS Studio experts including: Implementation Planning, Form Conversion, Advisement, Solution Architecture	\$2,000
<b>Guided Implementation</b>	Up to 60 hours of services to help you implement GovOS Studio from start to finish which includes a combination of types of services like conversion, solutioning, discovery, advisement combined with a 3 day onsite workshop.	\$15,000
<b>Business Process Review</b>	When you want to focus on discovery and review, this package is best. Instead of implementation, a business process review focuses on auditing all of your agency processes and digital assets to organize and provide a roadmap to digital maturity.	\$15,000
<b>Process Deployment</b>	Up to 30 hours for end to end solution architecture of an end to end business process.	\$7,495
<b>Training Workshop (onsite)</b>	An onsite workshop to help your implementation based on the needs of your agency. This can be a combination of training, discovery, solutioning, form conversion.	\$3,000/day
<b>3 Day Onsite Workshop</b>		\$9,000
<b>Virtual Training Workshop</b>	A virtual (remote) workshop to help implementation based on the needs of your agency. This can be a combination of training, discovery, solutioning.	\$2,200/day
<b>Hourly Form Development</b>	Hourly form conversion and development to help create new forms, convert old forms and transfer existing forms into your GovOS Studio account. Pack of 10 hours	\$1,875
<b>Platform Manager</b>	Part time or full time manager to be the administrator of your GovOS Studio implementation.	Inquire