EXPERTISE, COLLABORATION, RESULTS: CUSTOMER SUCCESS

A Structured Approach to Ensuring Your Success with ProcessUnity

To meet high-stakes business goals, you need to implement a smart and effective risk management solution quickly and seamlessly. Just as importantly, your users need to see immediate value.

ProcessUnity's unique, refined, and proven implementation methodology – developed and enhanced over hundreds of successful customer engagements – brings your risk management strategy and vision to life. Our expert consultants have deep and broad experience implementing risk and compliance solutions for top companies worldwide. We'll dig in alongside you to understand the complexities and nuances of the business challenges you face – and design creative, effective solutions.

The team draws from a complete library of best practices to support single-phase and multi-phase engagements and ensure a fast, predictable experience. Using an Agile approach, we work diligently to ensure your risk

management program achieves greater success – faster than traditional waterfall methods.

Our methodology is predicated on a "Teach to Fish" approach that can make your organization self-sufficient. You do as much or as little of the solution setup as you want – from being fully enabled to manage and enhance your system independently, to simply defining your needs and letting ProcessUnity handle all configuration and rollout tasks. ProcessUnity can even act as your application administrator.

Let our implementation experts work with your team to plan and implement our solution in manageable phases. Each milestone you achieve puts real value in the hands of users, generates momentum for the project team, and demonstrates tangible business results to stakeholders and executives.

ProcessUnity Customer Success Engagement Methodology

PROJECT KICKOFF

01

DISCOVER
Understand your requirements and deliver a complete implementation plan.

02

ENABLE
Learn how to configure and use the ProcessUnity Platform.

03

CONFIGURE
Making the necessary changes to support your risk managemnt program.

04

DEPLOY
Deployed changes and perfom user accepteance testing.

END PROJECT OR START NEXT PHASE

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Kickoff

As soon as you become a ProcessUnity customer, our Customer Success team swings into action to accelerate your deployment. We start with a 60-minute Kickoff session, enabling you to meet our team, cover your subscription, and get a thorough review of the enablement process. We'll discuss your specific program and outline the entire process to get you up and running.

Discovery

The facilitated Discovery session provides a thorough understanding of what it takes to move forward with your specific deployment. We deliver an overview of the application and work with you to build a customized project plan. At the end of the Discovery session, you will have a complete and customized plan to guide you through the deployment and implementation of your risk management solution.

Enablement

In these hands-on workshops – the heart of ProcessUnity's implementation services – we teach you how to configure and use the ProcessUnity platform. Leveraging information from the Discovery session, we guide you through how to make changes and show you how to independently complete others prior to the next phase.

Configuration

Our experts will mentor your application administrator throughout the configuration phase and assist them in making changes necessary to support your risk management program.

User-Acceptance Testing and Prep

Once the system is properly configured and deployed, ProcessUnity supports your team as they perform user-acceptance testing – including adding test users. We also coach you through configuration changes and issue resolution.

ProcessUnity