HEALTH CHECK

Best Practices Change. Technology Advances. Take Advantage and Re-Energize Your Program.

ProcessUnity's Health Check program is a short-term, fixed-price services engagement that combines today's best practices with our newest technologies to reinvigorate your risk and compliance programs. Designed to be completed within 30 days, a Health Check is equal parts evaluation and enhancement – our experts identify areas to strengthen your program and then quickly put recommended changes into effect.

Program at a Glance

- Fixed Price Program (Up to 30 Days)
- Access to a ProcessUnity Customer Success Expert
- Multiple Live Workshops (Remote & In-Person)
- Training & Enablement

Program Features

01 Online Discovery Workshop – The process begins with a three-hour, online workshop used to identify potential areas of improvement. We start with a high-level walkthrough of your current implementation to understand how the system is used today, then work through our checklist to capture new program goals, surface new ideas and discuss how new ProcessUnity features could be incorporated into current processes.

02 Recommendations / Plan – Based on the information gathered in the Discovery Workshop, our Customer Success expert will develop a plan to be executed in the Onsite Workshop.

03 Onsite Workshop – The real work happens during the two-day Onsite Workshop. In conjunction with your application administrator(s), our Customer Success expert will work to implement the approved recommendations, training your team in the process. Any additional areas for improvement identified while onsite will be prioritized as time permits.

04 Health Check Report – Following the Onsite Workshop, our team will compile a summary recap of the Health Check. The report includes a detailed summary of the actions taken plus any additional recommendations that your team can perform to continue tuning after the engagement.

05 Online Debrief Workshop – Within two weeks of the Onsite Workshop, we'll meet to review the Health Check Report and take a final walk through your instance. We'll complete the three-hour session by highlighting the new capabilities built into your program and answer any outstanding questions.

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Customer Benefits

Short-Term / Fixed-Price – Our Health Check methodology has been developed based on engagements with many ProcessUnity customers. We work closely with your team to identify and implement changes with the greatest impact within the confines of the program.

Professional, Outside Advice – Leverage the expertise gained from hundreds of risk and compliance programs and implement current best practices perfected throughout the industry.

Built-in Training / Enablement – Working alongside our expert, your team will benefit from additional insight and training that will power future system improvements.

Additional Details & Restrictions

- The Health Check program may only be purchased once per customer instance.

- The program must be completed within 45 days of the Online Discovery Workshop.

- The Onsite Workshop can be conducted at ProcessUnity or at a location chosen by the customer. Related travel and expenses are additional.

- The program includes a single ProcessUnity Customer Success expert. Multi-resource engagements require additional fees.

- Health Check is not available for customers in an active implementation or professional services project.

Sample Program Process

DAY (ESTIMATED)	WORKSHOP / DELIVERABLE
01	Online Discovery Workshop (3 Hours)
04	Recommendations / Plan
10-11	Onsite Workshop (2 Days)
14	Health Check Report
28	Online Debrief Workshop (3 Hours)
30	Project Complete

Learn more about ProcessUnity's Health Check program today. Contact us at customer.success@processunity.com.

ProcessUnity

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