EcoOnline

Onboarding eCompliance Welcome Kit

Table of contents

Welcome to EcoOnline eCompliance!

EcoOnline eCompliance's focus is to encourage frontline participation in daily Health and Safety activities through ease of use and access. This tool will empower champions of Health and Safety by reducing their administrative burden and providing them with the data to make positive changes.

We combine our knowledge from existing customers with your specific goals, to create a unique program tailored to your learning objectives. EcoOnline's Customer Success Team will partner with you in the initial stages of getting your account setup and will have you leaving onboarding as an expert on your eCompliance Use Cases, while also providing strategic feedback and transparency with your goals, as you drive towards full adoption and celebrate milestones.

What does your Customer Success Team do?

- Initial account setup ensuring that the account aligns with your needs
- Designs and executes on a training plan based on your business use cases and previous customer implementations
- Oversees your implementation from onboarding to launch, ensuring to answer your questions and provide you with best practices
- Relationship owner throughout the rest of your journey, acting as a trusted strategic advisor in change management and success planning

Our ask

- Attend each training session engaged, ready to ask questions, having completed asks from prior sessions
- Collaborate with your internal project team outside of each training session to build on learnings and drive required actions forward
- Coordinate and assign who will be owning any technical configuration, content creation, and use case testing

Welcome to EcoOnline eCompliance!

Roles to be filled

For a successful launch and integration into your standard operations, we suggest identifying who will be owning the key roles below. You can choose to assign an individual or a team to each role. It's important to define and designate these roles early to ensure sufficient resources during and after the project.

Executive Sponsor – Change management efforts and communications to teams

Project Owner – Main Point of Contact (POC) for EcoOnline and a driving force on the customer end to ensure project is successful

Primary Admin – Managing the day-to-day admin duties of the product

IT Resource – Assisting with technical integrations and overall technical asks (Safe listing, software, and hardware requirements, etc.)

Content Creator – Building out the account with the company's content (forms, employee information, etc.)

Power User – Frontline product users that test and provide feedback on workflows

Resources

The following resources are available to you every step of your Implementation:

- Dedicated Onboarding Specialist throughout your onboarding journey
- Technical Support Team accessible at **9am EST – 5pm EST** to call **1 800-686-1915 Option. 2** or Submit a Request
- 24/7 access to our Support Portal containing help articles, release notes, and FAQs
- Self-Guided product articles to help build product foundation
- Change Management documentation to assist with the adoption of new processes and tools (Password: EcoonlineSafety123)
- Internal and External Communications Templates Sample letters to send to internal and external stakeholders discussing implementation of EcoOnline eCompliance.

Stages of Onboarding

1 - Strategy & Planning

Kick-off & Discovery

Building on what was already discussed during the sales cycle we begin our journey with a kick-off to ensure alignment on this project between parties. We want to understand your key players, business objectives, success criteria, current technology, resources, and target launch dates, as this valuable information will inform the overall onboarding strategy. Communication is key at this stage, it is important to spread the word of this new product to your teams to build up excitement and preparation for change.

2 - Configuration

Site Setup & Data Requirements

We will handle the initial setup of your account, sending over invites to login to your account to those that will be part of onboarding. Following the kick-off, a data requirements call will be held focusing on high level concepts of the product and best practices on how to build your account to best achieve your use cases.

3 - Training

Train-the-Trainer sessions & Hands-on learning

Use case driven virtual training sessions with the identified key players. Sessions are driven by you to get hands on learning of the product with each session having takeaways to complete, read/watch, discuss to ensure that we are building a solid foundation. Throughout training you will be building out your account with your content.

4 - Validation

Testing & Feedback

One of the most important pieces to success is the adoption of the platform by your frontline which puts heavy emphasis on having an identified group of testers. With testing you will want to have a feedback loop in place where you can action all feedback to ensure a smooth launch. At this point you should have a roll out plan designating who will be using the system first, what use cases you will be focusing on, and a training plan for your users.

5 - Launch

Go Live & Monitoring

Now that everything is done, it's time to start doing phased roll outs to your team to see your benefits. Having your success criteria and business objectives established allows you to measure which areas are moving well & which need some improvement. The feedback loop should continue as the platform and workflows at launch should be seen as version 1.

Recommendations/Considerations

The EcoOnline Customer Success team asks you to bring the following ideas and answers to our kick-off to ensure a strong start to the project.

Identify business objectives/ Current pain points

Define the success criteria you want to achieve after onboarding and your long-term goals, so we can establish a success plan that maintains your trajectory. This includes identifying a problem and its potential solutions, how EcoOnline eCompliance will help your team, short and long-term goals, key performance indicators to measure success, and more.

- Question 1: What is the current problem you are looking to solution?
  - E.g., Reduce administration time and burden, increase frontline visibility, Create improvements to current health and safety practices to reduce risk.
- Question 2: How will the incorporation of EcoOnline eCompliance into our business help?
  - E.g., Having the form digitized avoids data loss and ultimately reduce time spent reviewing completed forms.
- Question 3: How will you measure success? Define your milestones and short-term goals that will move you towards your long-term goals. What are the current Key Performance Indicators (KPI) being tracked?
  - E.g., Increase health and safety participation by X%. Reduce number of incidents year over year by X%. Ensure no employees having training certifications that lapse leading to a fine in a year.

Define Your Minimum Viable Product (MVP)

For your company to initially get started with using the product, identify what content, forms, and workflows are needed at launch, and what can then be added over time?

MVP Resources

Once you identify your MVP, it will allow you properly identify necessary resources. Thinking back to the roles identified above what can you handle, both from a technical and a timing perspective, and what can you delegate to your team members?

- Initial launch team – assign roles and create a workback schedule.
- Identify potential risks and dependencies that can impact your launch date and result in a delayed or stalled implementation (e.g., holidays, vacations, other software implementations, etc.)

Let’s get started!

We look forward to your successful implementation and are excited to partner with your team as you begin your journey and grow with EcoOnline eCompliance!