PROFESSIONAL SERVICES

Enterprise Onboarding

This document is an outline of our Enterprise Onboarding process delivered by your Responsive Onboarding Consultants. The Responsive onboarding process has been designed to help you build a strong foundation for success with a strategic approach, so your team can start using the application with confidence!

The Onboarding Process

Below is the outline of each phase of our onboarding process. For onboarding, you will want to identify who will be your Core Admin Team – these users will be considered your "Responsive power users", and they should attend the onboarding sessions as they will become your internal experts on the application. Our objective is to provide a Train-the-Trainer experience to give the Core Admin Team enough resources to feel confident to start the implementation process with your wider team of users.

Our standard onboarding is defined yet flexible.

Working with your Responsive Onboarding Consultant, the plan can be adjusted and carried out in an average timeframe of 12-14 weeks. First, your Account Executive will introduce you to your Onboarding Consultant, who will schedule a Kick-off meeting. You'll proceed with foundational training on the application and then prepare for your go-live. Your Onboarding Consultant, Customer Success Manager, and Account Manager collaborate to discuss your goals and guide you through the process in a phased approach. More details of the onboarding process are provided in the following pages.

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Onboarding to Adoption Overview

	PHASE 1 Planning	PHASE 2 Foundational Training	PHASE 3 Deployment	PHASE 4 Adoption
Time frame	12 to 14 weeks		2 to 4 weeks	Ongoing
Responsive Resource	Onboarding Consultant	Onboarding Consultant	Customer Success Manager	Customer Success Manager & Account Manager
Sessions & Activities **These items are customer-led.*	Kick-off Meeting	Content Organization	Implement*	Recurring Office Hours
	Onboarding Prep*	Establish Tags, Custom Fields, and Collections*	User Training / Go-Live*	Account Review
	IT Configration*	Content Management*	Join the Customer Community*	Community Virtual Chats & Webinars*
		Project Lifecycle Part 1		
	-	Project Lifecycle Part 2	-	-
	-	LookUp Training	-	-
		Custom Templates		
		Organization Settings		
		Styles and Formatting		
		Reporting		
		Flexible Session 1		
		Flexible Session 2		
		Implementation Workshop		

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Phase 1: Planning and Kick-off

Kick-off meeting

Virtual Meeting | 60 minutes
Attendees: Core Admin Team (or Main Point of Contact) and Executive Sponsor
Responsible: Responsive & Customer

The Kick-off meeting introduces the Responsive Onboarding Consultant as the direct point of contact during onboarding. The Onboarding Consultant will lead this strategic discussion to provide an overview of the onboarding process and will discuss your goals for implementation.

OBJECTIVES

- Define customer goals for implementation.
- Review the onboarding process, and how the Customer can prepare for training.
- Schedule Foundational Training sessions, if time permits.

REQUIREMENTS

- Access to the calendar for scheduling purposes.

Onboarding Prep

Responsible: Customer
Estimated 1.5 hours to review training materials

During this phase, you will be gathering the appropriate documents to send to your Onboarding Consultant, along with reviewing the materials provided after the Kick-off meeting to prepare for training

REQUIREMENTS

- Identify your **Core Admin Team** – these are the implementation and admin members that will be your "Responsive power users". We highly encourage Core Admin Team members to attend all training sessions.
- Follow the **Admin Checklist** provided within the Kick-off deck.
- Customer to email the below documents required for foundational training sessions:
  - **Historical Data** - Content containing Question & Answer (Q&A) pairs for your Content Library. This is usually a consolidated response document or past RFP (docx or xlsx format preferred).
  - **Unanswered RFX** - An original RFX or questionnaire that contains no responses (docx or xlsx format preferred).

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IT Configuration

Responsible: Customer's Super Admin and IT Team
Estimated time: Varies depending on Customer's needs for set up and permissions

In order to have the best experience using Responsive, it is important to set up and enable your IT permissions. The preferred browser is Google Chrome. Virtual meeting invitations (via Zoom) will be sent from your Onboarding Consultant. Additional tips to make sure Responsive is functional:

- Google Chrome
- Enabling any IP restrictions
- Whitelisting email from the responsive.io and rfpio.com domains
- Updating your password policy

Integrations Setup (if applicable):
Responsive integrations are designed to be self-service and do not require training from Responsive. Coordination with your IT Team is to be carried out by your Super Admin. Configure Single Sign-On (if necessary), and any other integrations purchased based on your priorities. Integration Guides are provided by Onboarding Consultant after the Kick-off meeting.

Note: Complete setup of integrations is not required for onboarding. Reach out to **support@responsive.io** *for any technical assistance needed.*

REQUIREMENTS

- Add your IT members with the Admin User Role to grant access to the application settings.
- Core Admins have verified their Responsive account.
- All users have a compatible browser installed.
- Firewalls are set up to allow email notifications from Responsive.
- Admins have activated their Responsive account and are able to log in to the application.
- If applicable, determine the prioritization of integrations purchased. Coordinate with your IT Team to schedule configuration.

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Phase 2: Foundational Training

Content Management

Virtual Training | 3.5 hours
Attendees: Core Admin Team
Responsible: Responsive & Customer

During this four-part training, your Onboarding Consultant will lead your Core Admins through foundational Content Management strategies. An admin from your team will share their screen while being guided through the application.

OBJECTIVES

- Understand how to load content into the Content Library.
- Import a historical document to understand how to bulk upload Question & Answer content.
- Understand how to search and filter through the Content Library.
- Review key features of the Content Library (e.g., edit properties, how to apply bulk updates, etc.)
- Understand best practices of content organization within the Content Library.
- Discuss your content organization strategy (i.e. Tags, Collections, Custom Fields, Reviews, etc.)
- Understand best practices of file attachment using the Content Library in Responsive.

Content Management Sessions	Time
Content Organization	60 minutes
Establish Tags, Custom Fields, and Collections	45 minutes
Content Management	60 minutes
Content Library	45 minutes

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Project Management

Virtual Training | 3.75 hours
Attendees: Core Admin Team
Responsible: Responsive & Customer

During this four-part training, your Onboarding Consultant will lead your Core Admins through foundational Project Management features. An admin from your team will share their screen while being guided through the application.

OBJECTIVES

- Walk through a project lifecycle, from creation to export.
- Understand how to assign Authors & Reviewers, and how to collaborate on a project.
- Understand how to leverage the Recommendations tool to respond to questions.
- Discuss current project workflows, and how they might change or be applied in Responsive.
- Walk through how to search for and access content via LookUp.
- Understand the purposes and use cases for using Word Templates and Section Templates.
- Understand how to create and add Section Templates into a project.
- Understand key components of Word Templates and how to configure them in Responsive.
- Walk through how to export a project into a Response Template (Word version).

Project Management Sessions	Time
Project Lifecycle Part 1	60 minutes
Project Lifecycle Part 2	60 minutes
LookUp Training	45 minutes
Custom Templates	60 minutes

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Additional Training

Virtual Training | 5 hours
Attendees: Core Admin Team
Responsible: Responsive & Customer

Your Onboarding Consultant will guide your Core Admins through topics that require more in-depth education and analysis (based on your needs). The goal is to take a deeper dive into areas that are important for your RFX process and your business. Your Onboarding Consultant will discuss training options with Core Admins.

OBJECTIVES

- Pointed training for features and functionality that are important for your use cases.
- Review key Admin Organizational Settings within the application.
- Understand key components of Word Styles and Formatting and how to configure them in Responsive.
- Walk through standard reporting including project dashboards, usage reports, and content library insights.
- Deliver two Flexible Sessions that will fill any knowledge gaps prior to the implementation.

Additional Trainig Sessions	Time
Organization Settings	60 minutes
Styles and Formatting	60 minutes
Reporting	60 minutes
Flexible Session 1	60 minutes
Flexible Session 2	60 minutes

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Implementation Workshop

Virtual Training | 60 minutes
Attendees: Core Admin Team
Responsible: Responsive & Customer

The Implementation Workshop marks the end of the initial Onboarding Cycle, at which point you will engage directly with your Customer Success Manager, who will continue to provide strategic best practices as you progress within the application. During the Workshop, we'll discuss your rollout strategy, review your plans for implementation, and arrange the next steps with your Customer Success Manager.

OBJECTIVES

- Customer to share plans for implementation: Content Management Strategy, Project Workflow, and Deployment Plan.
- Determine a go-live date.
- Arrange next steps and schedule next meeting with your Customer Success Manager.

REQUIREMENTS

- Spend dedicated time in Responsive to begin defining your content strategy and project workflow.
- Come to this meeting with a good picture of your rollout plan to the team.

Phase 3: Deployment

Implementation

Responsible: Customer
Estimated time: ~1 week

The goal of implementation is to allow Core Admins to practice learnings from the foundational training sessions, so they can confidently use the system and plan for go-live. Core Admins should be competent in managing a Project in Responsive and knowing how to search and leverage the Content Library.

REQUIREMENTS

- Admins to spend dedicated time in Responsive and apply learnings.
- Import content into the Content Library.
- Organize content by Tags and/or Collections and/or Custom Fields in the Content Library.
- Establish your Subject Matter Experts (these users will become Content Owners).
- Outline Project property details and define any naming conventions.
- Establish your project workflow and who will need to collaborate.
- A "live" RFX has been identified, created, and mapped into Responsive as an Active Project.
- A rollout plan has been determined and select users have been granted Responsive access.

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User Training / Go-Live!

Responsible: Customer
Estimated time: ~1 week

A soft launch or full go-live within the organization can be planned at this phase. The Core Admin Team will begin to train additional team members and users in Responsive. Attendees might include Subject Matter Experts, the Proposal Team, Marketing, Bid Team — anyone who will be interacting with the application. This may take a few training sessions depending on the size of the team and the area of application that users need to learn. Go-live should entail project team collaboration on a live RFX, and use of the content in the Content Library.

REQUIREMENTS

- Conduct role-specific user training within your organization.
- Assign Subject Matter Experts as Content Owners within the Content Library.
- Enable Review Cycles, as applicable to your content management strategy.
- Assign Authors and Reviewers to a live RFX.
- Leverage the Content Library by using the Recommendation Engine to respond to the live RFX.
- Manage live RFX from creation to completion.

Recommended courses for role-specific user training:

- Responsive Academy Courses:
  - **Intro to Responsive**
  - **Getting Started: The Team Member Role**
  - **Getting Started: Authors (any Role)**

Responsive Academy **Live Workshops.**

Customer Community

Join the Responsive **Customer Community** to connect, share, learn, and celebrate. Easily access all our resources, including our Help Center, University, Blogs, and Events. Join discussions with other Responsive customers.

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Flex Sessions

After you have deployed Responsive within your team, Flex Sessions are provided as needed to the Core Admin Team as additional training time led by the Customer Success Manager. Flex Sessions are structured as separate 30-minute sessions. They are designed to promote continued learning in the application. These sessions are not mandatory but are made available based on your needs and as recommended by the Customer Success Manager. These sessions are only offered during the first year of onboarding.

Examples of Flex Sessions include: Content Library Maintenance, Recommendations and Auto-Respond Best Practices, Proposal Builder, and Standard Reporting. Ask your Customer Success Manager for recommended topics for your Flex Sessions.

Phase 4: Adoption

Office Hours

After you have deployed Responsive within the organization, recurring Office Hours are provided to the Core Admin Team as dedicated meeting times with their Customer Success Manager. During these sessions, your Customer Success Manager will review progress toward goals and assist with enabling you to measure success. General Q&A will also be addressed. It is recommended to schedule Office Hours on a bi-weekly basis or at a minimum of once per month.

Account Review

Virtual Meeting | 60 minutes
Attendees: Core Admin Team (or Main Point of Contact) and Executive Sponsor
Responsible: Responsive & Customer

Further into the adoption phase, you'll connect with your Account Manager for a formal Account Review. These business meetings are held to align goals, share key updates, and review your usage of the application. This discussion will also cover any valuable new offerings, as well as evaluate any gaps or additional needs. The Core Admins and Executive Sponsor should be in attendance of the Account Review meeting.

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Professional Services

If your team requires additional support and training, our Professional Services team can provide the following services for an additional fee:

- **Professional Service (PS) Hours -** Flexible bundle of hours to perform various Responsive Implementation, Project Management, and/or Content Management related activities. PS Hours can be used at any time during the contract terms with Responsive. Below are examples of some items PS Hours can be used for:
  - Content import and organization
  - Response template setup and configuration
  - Section template setup and configuration
  - Consulting services
  - Proposal Builder setup and configuration
  - Project creation, import, and mapping
  - Project export generation
  - Content audits
  - Best practices review and implementation
  - M&A support
- **Data Migration -** Responsive will migrate Q&A pair content from a legacy system into Responsive Content Library.
- **User Training -** Responsive can lead remote end-user training for your expanded team.

Speak with your Account Manager to discuss the scope of your Professional Services needs.

Additional Resources

Customer Success Team

Our expert team of Customer Success Managers is always happy to help. Reach out to **customersuccess@responsive.io** for additional guidance beyond our resources below.

Customer Community

Enroll in **Customer Community Events** to join our Coffee Chats and Webinars, along with other Responsive customers.

Responsive Academy

Responsive Academy is our learning center, which offers a series of on-demand courses and live workshops designed by our product experts. Once you become a Responsive user, you'll be able to access Responsive Academy.

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Help Center

The **Help Center** is your greatest resource for Responsive start guides, how-to's, release notes, and more! Once you become a Responsive user, you'll be able to access the Help Center by clicking the "Get Help" link within the application. Help Center content is also searchable within the Community.

Webinars

Responsive hosts a number of webinars throughout the year, all designed to keep you engaged and informed. Enable your newsletter & events preferences on your Responsive account to make sure you receive communications about our webinars. **Watch now.**

24/5 Support

Responsive provides a dedicated team to provide you assistance when you need it.
Contact our Support team:

- Click the 'Get Help' link within the application to Chat with our Support Team,
- **Submit a ticket** within our Help Center,
- Or send an email to **support@responsive.io**

Glossary of Terms

Responsive Teams

At any phase throughout your Responsive journey, you will have a team to support you.
See below... *we've got your back!*

- **Onboarding Consultant (OC)** - An Onboarding Consultant from our Professional Services team will be introduced at your Kick-off Meeting and will act as the primary contact for onboarding efforts.
- **Customer Success Manager (CSM)** - Our expert team of Customer Success Managers is always happy to help. Reach out to your assigned Customer Success Manager, or email **customersuccess@responsive.io** for additional consultation and guidance on the application.
- **Account Manager (AM)** - An Account Manager will assist with the ongoing health of your account via business indicators, KPIs, user activity, etc. The AM will be introduced post-onboarding and will act as the primary point of contact for account changes and renewal.
- **Support (Tier 1 & 2)** - The Responsive Support Team is an additional resource for our clients in order to provide frontline support, answers to immediate questions, troubleshooting, and general product help. Reach out to **support@responsive.io** for any technical assistance needed.

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Onboarding Consultant

Customer Success Manager

Account Manager

Customer Support

Application User Roles

It's vital to understand which role each individual member on your team will take on within the Responsive application. Once user roles are understood, you can begin to determine who should attend the onboarding sessions, as described in the outlined phases above.

Each of the following Primary Roles can access the Content Library (all or in part, depending on the role), but privacy settings can be applied to content or groups of content to restrict access.

- **Super Admin -** There is only one Super Admin in each organization. They have full access to everything system-wide**.**
- **Admin -** An Admin user has full access to all content & projects and can create other user profiles, including other Admins. They can edit company settings, invite new users, create new projects, and edit all sections and answers across projects. A Core Admin team participates in the onboarding process.
- **Manager -** Managers have full control of projects to which they are invited or have created. The Manager can create, edit, assign projects and sections to a project Team Member, and respond to questions. However, Managers are limited to only projects they are involved with and cannot see every project across the instance.

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- **Team Member -** The Team Member role can Author and Review assigned sections and questions. Team Members can also make Comments and Clarifications on sections and questions within projects they are members of.
- **Project Requester -** This optional role is a user who communicates with the proposal or bid team on a new opportunity by submitting an Intake Request with the attached RFX files. Note: Project Requester role can be seen only when the Intake Feature is enabled.
- **Guests -** A Guest is a non-credentialed user. They can only answer the questions and sections that they have been assigned. Any assignments a Guest receives will come through an email notification. Guest users cannot access your Content Library, nor can they log into Responsive at all. Anyone, even a third party, can collaborate as a Guest.