



SchedulePro Onboarding Packages

Revision #8

 **shiftboard**

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Implementation Packages Overview

For your implementation, the Shiftboard Customer Success team will provide a defined set of services based on the onboarding package selected in your order.

Shiftboard offers three implementation packages for SchedulePro, two of which can be combined with a Premium Service level:

Package	Focus and Purpose	Standard Service: What's Included	Premium Service: Added Support
Starter Onboarding	<p>Reduced scope trial to define future full SchedulePro deployment</p> <p><i>Goal: 60 days to go-live</i></p>	<p>Features and core workflows for purchased subscription</p> <p>No system integrations</p> <p>Up to two Groups, each with distinct scheduling processes</p> <p>Up to two additional coverage processes per Group</p> <p>Up to two Employee Types per Group</p> <p>Standard onboarding services</p> <p>One Supervisor / Train trainer session</p>	Not available
Enterprise Onboarding	<p>Best practice full deployment of SchedulePro Enterprise edition</p> <p><i>Goal: 80 days to go-live</i></p>	<p>Features and core workflows for Enterprise subscription</p> <p>Standard HCM self-service integrations</p> <p>Up to three Groups, each with distinct scheduling processes</p> <p>Up to three additional coverage processes per Group</p> <p>Up to three Employee Types per Group</p> <p>One Supervisor / Train trainer session</p>	<p>Integration discovery</p> <p>Solution design reviews with multiple stakeholders</p> <p>Facilitated User Acceptance Testing</p> <p>One additional Supervisor / Train trainer session</p>
Enterprise Plus Onboarding	<p>Best practice full deployment of SchedulePro Enterprise Plus edition</p> <p><i>Goal: 100 days to go-live</i></p>	<p>Features and core workflows for Enterprise Plus subscription</p> <p>Standard HCM self-service integrations</p> <p>Up to three Groups, each with distinct scheduling processes</p> <p>Up to three additional coverage processes per Group</p> <p>Up to three Employee Types per Group</p> <p>One Supervisor / Train trainer session</p>	<p>Integration discovery</p> <p>Solution design reviews with multiple stakeholders</p> <p>Facilitated User Acceptance Testing</p> <p>One additional Supervisor / Train trainer session</p>

All packages include the implementation of standard features for the purchased subscription plus automation of 'core workflows' for the designated number of 'groups' and 'employee types' defined in the package. The definition of these terms is as follows:

- A 'Group' is a set of workers that follows the same core workflows to reassign on-shift workers and find additional coverage for open shifts. Example: If you are implementing SchedulePro for three departments or locations, where two of them schedule workers through identical processes and one through distinct processes, that would constitute two Groups.
- 'Core workflows' are processes followed by a 'Group' that automate worker assignment to shifts. Each package includes core workflows as follows:

- Automation to restaff on-shift workers from overstaffed and non-critical positions, including managing secondary duty assignments and checks, shuffling worker assignments to meet qualification requirements, and line reassignments to address production changes.
- Automation of additional coverage workflows up to the stated maximum for that package. Examples include worker self-service to pick up overtime shifts, OT volunteering, automatic call-in based on seniority, and assignment of forced overtime to shifts that workers are qualified and available to work.
- *'Employee Types'* are categories of employees within a Group that may follow the same core workflows but have different rules that govern how they are assigned in those core workflows. Examples of Employee Types would be 'Regular,' 'Weekender,' 'Part-Time,' and 'Under 17.' Each Employee Type might have different rule sets governing which shifts they can be assigned to, even if their additional coverage assignment or reassignment is initiated through a common process.

Shiftboard's proven implementation process enables organizations to start using the SchedulePro solution within a short period from project commencement. These implementation milestones and signoffs also certify your instance for the [SchedulePro compliance guarantee](#). The implementation aims to minimize or eliminate customizations and streamline data migrations. By using features available out of the box, the implementation can be completed as rapidly and cost effectively as possible. All packages include onboarding services throughout the project lifecycle, as defined in this document. These services include delivery of a single SchedulePro production instance and a single test instance.

Starter onboardings can be combined with either Enterprise or Enterprise Plus subscriptions. The other onboarding packages are specific to the related named subscription package.

All packages excluding the Starter Onboarding include standard self-service integrations with Human Capital Management (HCM) systems, covering Employee core and extended data, plus Leave transactions. See below for a detailed summary of what is included with these self-service integrations.

Premium onboarding services extend Shiftboard support in certain critical phases of the project. These service extensions include reviews of solution design with stakeholder groups such as Unions, provision of testing workshops, and end-user training sessions, with additional project management support each week. Premium onboarding services also include an integration discovery to define and scope integration solutions beyond those included in the onboarding package. The scope of this integration discovery is further defined below.

All onboarding packages may be delivered remotely or through a blend of on-site and remote delivery services. On-site events are held for a minimum of three dedicated days. They typically center around discovery and design workshops, and/or train-the-trainer sessions prior to go-live (where your Customer Success Manager works directly with your team). Your fixed setup fee covers the delivery of *remote* onboarding services: customary travel expenses are rebilled if *on-site* onboarding events are requested. We recommend budgeting an additional 15-20% of your setup fee to fund billable travel if you desire on-site services.

This document defines the scope of these services and the associated set of customer tasks that your team will typically engage on. The above packages are explained below, along with the onboarding scope and assumptions common to all packages.

Starter Onboarding Package

Shiftboard's Starter onboarding package provides a trial implementation for up to two Groups through go-live. The package enables all standard features and core workflows for your purchased SchedulePro subscription. The Starter onboarding delivers a best-practice solution based on industry needs and your scheduling processes that can be reused in future site rollouts. A typical Starter onboarding will last from eight to ten weeks from kick-off to go-live.

The Starter Onboarding package includes the Shiftboard Standard implementation services as defined in the Project Tasks and Deliverables section below.

Enterprise Onboarding Packages

Shiftboard's Enterprise Standard and Premium onboarding packages provide full onboarding for up to three Groups. These packages enable all Enterprise edition standard features, standard employee and leave self-service integrations, and recommended workflows. Enterprise onboardings deliver broader scheduling workflow automation that allows for functions such as automatically rotating employees through a range of jobs. A typical Enterprise onboarding lasts eleven to thirteen weeks from kick-off to go-live.

The Enterprise Premium Onboarding package includes the Shiftboard Premium implementation services defined below in the Project Tasks and Deliverables section. The Enterprise Standard Onboarding package does not include these services, assuming that the Customer team will drive these activities.

Enterprise Plus Onboarding Packages

Shiftboard's Enterprise Plus Standard and Premium onboarding packages provide full onboarding for up to three Groups. These packages enable all Enterprise Plus edition standard features, standard employee and leave self-service integrations, and recommended workflows. Enterprise Plus onboardings deliver broader scheduling workflow automation that allows you to automate complex scheduling workflows, including secondary duties scheduling (Emergency Response teams) and compliance with PHMSA and API RP755 regulations. A typical Enterprise Plus onboarding will last fourteen to sixteen weeks from kick-off to go-live.

The Enterprise Plus Premium Onboarding package includes the Shiftboard Premium implementation services as defined in the Project Tasks and Deliverables section below. The Enterprise Plus Standard Onboarding package does not include these services, assuming that the customer team will drive these activities.

Team Commitment

Shiftboard is committed to providing all customers with an industry-leading onboarding program. Resources are allocated to your account to complete the implementation process promptly and efficiently. All training and support in the onboarding package will expire 180 days from contract execution. Additional services are available after this time for an additional cost. Please contact your Account Manager for additional details.

Onboarding Services Included in All Packages

Implementation Methodology

For all packages, onboarding services use the methodology defined below. These services include project management, initial data gathering, discovery, configuration, user acceptance testing support and/or training, and cutover support.

Site Specific Task
 Kernel Leveraged Task

Plan & Define	Discovery & Configuration	User Acceptance Testing	Training & Change Management	Launch & Go-Live
		CORE SOLUTION		
<div style="background-color: #1a3d4d; color: white; padding: 5px; margin-bottom: 5px;">Kick-off & Provisioning</div> <div style="background-color: #00a0c0; color: white; padding: 5px; margin-bottom: 5px;">Foundation Training</div> <div style="background-color: #1a3d4d; color: white; padding: 5px;">Define Base Schedule</div>	<div style="background-color: #00a0c0; color: white; padding: 5px; margin-bottom: 5px;">Agile Discovery</div> <div style="background-color: #1a3d4d; color: white; padding: 5px; margin-bottom: 5px;">Populate All Schedule Data</div> <div style="background-color: #1a3d4d; color: white; padding: 5px;">Configuration Sign-off</div>	<div style="background-color: #00a0c0; color: white; padding: 5px; margin-bottom: 5px;">Product Training</div> <div style="background-color: #1a3d4d; color: white; padding: 5px; margin-bottom: 5px;">Testing Workshop</div> <div style="background-color: #1a3d4d; color: white; padding: 5px;">User Acceptance Testing</div>	<div style="background-color: #00a0c0; color: white; padding: 5px; margin-bottom: 5px;">Build End-User Training Collateral</div> <div style="background-color: #1a3d4d; color: white; padding: 5px; margin-bottom: 5px;">Process Instructions</div> <div style="background-color: #00a0c0; color: white; padding: 5px;">End-User Training</div>	<div style="background-color: #1a3d4d; color: white; padding: 5px; margin-bottom: 5px;">Launch Planning</div> <div style="background-color: #1a3d4d; color: white; padding: 5px; margin-bottom: 5px;">Launch & Cutover</div> <div style="background-color: #1a3d4d; color: white; padding: 5px;">Hypercare</div>
		INTEGRATION		
<div style="background-color: #00a0c0; color: white; padding: 5px;">Integration Assessment</div>	<div style="background-color: #00a0c0; color: white; padding: 5px;">Integration Design</div>	<div style="background-color: #1a3d4d; color: white; padding: 5px;">Systems Testing</div>	<div style="background-color: #00a0c0; color: white; padding: 5px;">Systems Workflows Trainings</div>	
		ADOPTION		
<div style="background-color: #00a0c0; color: white; padding: 5px; margin-bottom: 5px;">ROI Benchmarks</div> <div style="background-color: #1a3d4d; color: white; padding: 5px;">Stakeholder Confirmation</div>	<div style="background-color: #00a0c0; color: white; padding: 5px; margin-bottom: 5px;">Adoptions Planning</div> <div style="background-color: #00a0c0; color: white; padding: 5px;">ROI Metrics</div>	<div style="background-color: #00a0c0; color: white; padding: 5px; margin-bottom: 5px;">Adoption Strategy Workshop</div> <div style="background-color: #1a3d4d; color: white; padding: 5px;">Change Management & Process Communication</div>	<div style="background-color: #00a0c0; color: white; padding: 5px; margin-bottom: 5px;">Adoptions Collateral</div>	<div style="background-color: #00a0c0; color: white; padding: 5px; margin-bottom: 5px;">Support Transition</div> <div style="background-color: #1a3d4d; color: white; padding: 5px;">ROI Measurement</div>

SchedulePro onboarding is delivered in several phases:

- Plan and Define:** From the start, we want to develop a partnership for success! Your critical ROI goals, integration specifications (if applicable), user adoption needs, and product knowledge requirements will be top of mind. Key stakeholders and metrics will be identified as we begin the onboarding process. The base data collected will be used to create your draft test instance. Project team members will be supported with foundational training material to help them guide system configuration.
- Discovery & Configuration:** Shiftboard will conduct a discovery workstream covering all functional groups. This phase will allow us to gather workflows, feature requirements, overtime rules, fatigue requirements, etc. Working together, we will continue to explore your specific use case to configure the optimal solution. Any integration workflows will be defined in tandem with end-user adoption planning and a focus on education. Scheduled, interactive sessions combined with online simulations and in-application documentation will prepare the project team for future phases.
- User Acceptance Testing:** Shiftboard will support you through the UAT phase by providing detailed process scripts and reviewing any identified issues or gaps. Projects including integration will manage data flow testing. A continuation of online product lessons and adoption planning will help your team make informed decisions and guide the creation of reusable announcements and training collateral.
- Training & Change Management:** Change management is critical to a successful implementation. Shiftboard will help you plan your software rollout by offering signage templates, adoption messaging, and best practice recommendations. We will provide online training materials and instructor-led sessions to train schedulers, supervisors, and system administrators. We will also conduct a session to “train your trainers,” so they are prepared to teach employees your specific operating procedures.
- Launch and Go Live:** Your customer success team will make sure everything is ready before going live with SchedulePro. Working closely with your project team, we will ensure that all aspects of your operation are

on track to meet your ROI goals. Shiftboard will guide you through the software rollout and help you encourage user adoption. Shiftboard will assist you with the post-live transition and continued change management. After a month of Hypercare, the project team will be transitioned to our experienced support team. Your account manager is in constant contact for continued assistance.

After you complete your go-live, the Shiftboard Customer Success team will support your solution adoption through to the end of your first subscription year. We will conduct regular health checks and optimization calls to review usage and support you in achieving your initial goals.

Project Tasks and Deliverables

Below is an overview of project phases along with your and our accountabilities to ensure timelines and project expectations are met.

Phase	Key Deliverables	Shiftboard Responsibilities	Customer Responsibilities
Plan and Define	Project kickoff with agreed stakeholders resources & work plan	<ul style="list-style-type: none"> ○ Introduce the Shiftboard project team ○ Clarify implementation methodology process and joint accountabilities, along with critical success factors ○ Summarize project description, goals and conduct kickoff call ○ Propose project work plan ○ Propose ongoing status calls and onboarding status reporting ○ Provision SchedulePro instance(s) for onboarding 	<ul style="list-style-type: none"> ○ Complete discovery survey (typically in pre-sales) ○ Introduce the client project team ○ Confirm project stakeholders ○ Confirm project goals, joint accountabilities ○ Confirm project work plan ○ Attend all scheduled project status reviews and complete requested actions
Plan and Define	Foundations training and Integration Assessment completed Base schedule data defined & loaded	<ul style="list-style-type: none"> ○ Provide schedule base data template and guide customer on completing it either partially for initial prototype or in full ○ Review base scheduling and mapping data requirements, including shift times, shift patterns, valid positions, valid locations, and employees ○ Complete initial solution setup using as inputs a) the discovery survey provided by the customer; b) the schedule base data provided by the customer; c) any relevant Shiftboard best practice templates for the customer's industry ○ Conduct integration assessment as needed 	<ul style="list-style-type: none"> ○ Project team takes and completes SchedulePro Foundations Training ○ Complete and submit discovery survey ○ Provide complete and accurate base schedule data (shift requirements, shift patterns, valid positions, valid locations, and employee lists) that is representative of the needs of each scheduling group; then verify after load ○ Attend integration assessment and provide information / access to review source/target systems as needed
Discovery & Configuration	Confirmed functional design and working prototype	<ul style="list-style-type: none"> ○ Lead requirements-gathering sessions with SMEs following a single discovery workstream covering all functional groups; to gather overtime/extra-time rules, fatigue and work rules, workflows and feature requirements ○ Shiftboard may use agile prototyping in SchedulePro to confirm requirements. Up to three prototyping reviews per schedule group can be used to drive to an agreed solution design/configuration ○ Draft and submit System Requirements summarizing proposed system configuration, also preparing a gap analysis if relevant. Configured features, rules, and workflows will be constrained by the purchased SchedulePro edition and onboarding package ○ SchedulePro features (including scheduling automation and employee self-service) and required SchedulePro rules will be configured according to the System Requirements document <u>Packages with Premium onboarding services:</u> ○ Walkthroughs of planned solution design with stakeholder groups outside of the core project team 	<ul style="list-style-type: none"> ○ SMEs from each functional Group participate in relevant discovery sessions ○ Review current rules, policies, and procedures ahead of discovery; internally define and agree on all requirements ahead of each discovery topic so solution prototyping sessions are focused on specific outcomes ○ Confirm that all documented requirements are addressed through the agreed solution design ○ Review gap analysis and approve agreed change requests ○ Verify that prototype configuration matches the agreed System Requirements ○ Sign off on the System Requirements document, which will become the foundation for your SchedulePro compliance guarantee

Phase	Key Deliverables	Shiftboard Responsibilities	Customer Responsibilities
Discovery & Configuration	Integration Design	<ul style="list-style-type: none"> ○ Standard self-service integrations will be implemented to agreed parameters if they are selected (not available in Starter package) ○ Integration Designs for any custom integrations will be drafted ○ If required a separate SchedulePro instance can be provided for integration testing 	<ul style="list-style-type: none"> ○ Review integration self-service capabilities and confirm fit to requirements ○ Understand and plan for all data submissions needed to leverage self-service integrations ○ Approve submitted custom integration designs
Discovery & Configuration	Populate all scheduling data	<ul style="list-style-type: none"> ○ This phase may be a minor refresh of previously loaded data if the data loaded for the initial solution setup was complete. Conversely, it will be more involved if the initial solution setup used partial, representative data ○ Shiftboard's role in this phase is to guide the customer team on fully populating schedule base data template and performing the data load within SchedulePro 	<ul style="list-style-type: none"> ○ Using SchedulePro data loads. fully populate schedule base data with current and accurate shift requirements, shift patterns, valid ranks/positions, valid locations/jobs, and employee lists ○ At the completion of the data load process, the customer will validate complete and correct base schedule setup and readiness to proceed to User Acceptance Test
User Acceptance Testing	Functional and systems testing and acceptance	<p>Functional testing refers to the testing of Workflows, Rules and Features within SchedulePro itself.</p> <p>Systems testing refers to the testing of integrations and the flow of data into and out of SchedulePro to support HCM/WFM processes</p> <p><u>All Packages:</u></p> <ul style="list-style-type: none"> ○ Provide base test cases to help drive testing activities ○ Track and resolve identified gaps <p><u>Packages with Premium onboarding services:</u></p> <ul style="list-style-type: none"> ○ Organize testing workshops to plan and script customer testing activities ○ Organize regular check-ins to monitor testing progress and provide updates on issues/gaps identified 	<p><u>All Packages:</u></p> <ul style="list-style-type: none"> ○ Complete provided LMS product training on all SchedulePro features to be ready to execute required testing within SchedulePro ○ Develop any business process-specific test cases ○ Execute, validate and sign off test cases ○ Sign off on configuration accuracy and finalize the System Requirements document, which will form the documented reference for your <u>SchedulePro compliance guarantee</u> <p><u>Packages with Standard onboarding services:</u></p> <ul style="list-style-type: none"> ○ Ensure complete and accurate testing of all features, rules, and workflows by the customer testing team
User Acceptance Testing	Adoption strategy workshop	<ul style="list-style-type: none"> ● Conduct an Adoption Strategy Workshop to plan for successful training of, and adoption by, scheduler, supervisor and worker end users ● Provide end-user adoption collateral and training to customer project team 	<ul style="list-style-type: none"> ● Attend Adoption Strategy Workshop ● Develop a change management and process communication outreach strategy to end users: before, during and after go-live

Phase	Key Deliverables	Shiftboard Responsibilities	Customer Responsibilities
Training and Change Management	Completed and delivered end-user training curriculum	<p><u>All Packages:</u></p> <ul style="list-style-type: none"> ○ Provide online LMS (Learning Management System) access to all user roles (Employee, Supervisor and Scheduler) supporting training needs on SchedulePro workflows, rules and features. Includes video, product simulation content and hands-on exercises that are complemented with in-application help documentation and job-aids ○ Create site-specific additional training collateral for System Administrator, Scheduler, Supervisor and Employee functions within SchedulePro that reflect specific workflow, rules, and systems integration needs ○ Deliver one System Administrator/Scheduler/Schedule Manager training for up to ten attendees. The training session will include extensive hands-on activities and be recorded for re-use ○ Provide promotional adoption tools and guide project team through a successful end-user launch using best practices <p><u>Packages with Premium onboarding services:</u></p> <ul style="list-style-type: none"> ○ Shiftboard will deliver two System Administrator/Schedule Manager and two Employee training sessions (total of 4 sessions), with a maximum of 10 attendees per session. Shiftboard instructors will provide individualized support to trainees during hands-on sessions. 	<p><u>All Packages:</u></p> <ul style="list-style-type: none"> ○ Identify who will manage employee training to participate in the train-the-trainer session(s) to enable the customer team to deliver additional or future such trainings themselves ○ Develop any required end-user training materials beyond the SchedulePro functional guides from Shiftboard (e.g., business workflow instructions) ○ Identify end-user training attendees, ensure user completion of all LMS enrollment content, schedule and ensure attendance at follow-up training sessions as needed ○ Track end-user questions, issues, and feedback to be shared with Shiftboard. Communicate responses and problem-resolution details to users. ○ Partner with Shiftboard to implement adoption best practices.
Launch and go-live	Cutover to Production	<ul style="list-style-type: none"> ○ Hold launch / cutover planning workshop ○ Setup and migrate data to production ○ Provide go-live cutover checklist ○ Provide timely responses to any issues identified 	<ul style="list-style-type: none"> ○ Plan and manage go-live rollout ○ Support rollout and change management ○ Communicate responses and problem resolutions to users
Launch and go-live	Hypercare and Support handoff	<ul style="list-style-type: none"> ○ Onboarding team will provide hyper-care support for one month following go-live. ○ Hold Support Handoff workshop to transition to customer support ○ Provide support procedures ○ Provide usage data in hypercare to support adoption and ROI measurement / validation 	<ul style="list-style-type: none"> ○ Sign off on hyper-care completion with no major issues preventing transition to customer support ○ Focal point(s) to handle first-level support ○ Focal point(s) to aggregate support queries before escalating to Shiftboard

Project Assumptions - Critical Success Factors

To mitigate time delays, cost increases, and unmet expectations, the following factors are deemed critical to the success of the implementation:

- Project is supported and championed at the highest levels with authority to drive process change.
- Change management is built into the culture of the project, including the need for business process reengineering to minimize customization.
- Client and Shiftboard teams work collaboratively and maintain clear and transparent communication.
- Project team has necessary experience in their project role, including the necessary analytical, technical, and organizational skills as required.
- Adequate resources are assigned to the project team, and there is continuity for the project's duration.
- Project resources are allocated to ensure sufficient time is dedicated to the project within their day-to-day responsibilities.
- Subject matter experts have the necessary expertise in the areas of scheduling rules, practices and procedures, HR policies, and management goals.
- Timely access to subject matter experts, especially when working shift work.
- Project management is effective and efficient but not over-structured to the point of burdening the project team.
- Requirements, testing, and acceptance are done iteratively and throughout the project.
- Requisite onboarding milestones are signed off in a timely manner.

Project Assumptions – Not in Scope effort

Unless otherwise noted in the service delivery contract, the following items are not in the scope of the SchedulePro onboarding packages:

- Implementation of features not included in purchased [SchedulePro edition](#)
- Implementation of scheduling workflows and work rules beyond package constraints listed above
- Custom features or reports
- Non-standard self-service integrations
- Extensive or complex custom totals thresholds
- Advance Rest Days features
- Light workload unassignment
- Staggered start times within a shift requirement/schedule pattern
- Flexing shift requirement start and end times to worker availability
- Ongoing review of union contract/policy documents beyond initial discovery assessment
- Current state workflow mapping, process improvement recommendations, or business reengineering consulting outside of workflows directly pertaining to SchedulePro
- Change management and business process communication to end users
- Development of standard operating procedures and custom documentation

It is possible for some of these services, such as non-standard integrations, to be contracted additionally via a statement of work that would be implemented in parallel with the standard onboarding package. All such additional services are required to have an agreed upon SOW and must be signed off prior to project kickoff (or a specific milestone within the project timeline). Contact your Account Manager and Customer Success Manager for more information.

Self-Service Integrations Included in Standard and Premium Packages

SchedulePro can now automatically import the following data from external sources such as HRIS, LMS, and ERP systems at your desired frequency:

- Employee data including names, employee numbers, and active status
- Employee skills, qualifications, proficiencies, plus permitted positions and jobs
- Employee-assigned shift patterns
- Approved leave requests
- Time entries

Full definitions for all currently available standard imports can be found on our [Integration templates website](#), and guidance on how to enable these integrations can be found at [Managing flat file integration](#).

All onboarding packages except the Starter package include setup of these self-service integrations. These self-service integrations allow you to:

- Reduce the manual work required to maintain data across multiple systems.
- Create error-free schedules with timely and accurate data.
- Run SchedulePro reports such as Work Rule Audit and Qualification and Proficiencies with external data sources.

As part of the standard integrations service, in addition to the integrations above, the Shiftboard onboarding team will train you on SchedulePro APIs if you wish to call our APIs directly for additional or real-time integration needs. Documentation on our current APIs is available [here](#).

Shiftboard's onboarding packages include services to utilize Drop Point sFTP transfer or APIs based on the published data entry formats and related functions ('endpoints') released with those tools. Customers are responsible for developing all solutions and processes required for third-party systems to interact with these published endpoints. Shiftboard's standard onboarding packages do not provide consulting services on accessing endpoints from third-party systems.

Additional Onboarding Services Included in Premium Packages

Refer to the Project Tasks and Deliverables table above for the point in the onboarding process where these additional services are delivered.

Integration Discovery

Premium packages include an Integration Discovery as part of the overall service. During the Discovery phase of the onboarding, Shiftboard will review your Human Capital Management (HCM), Workforce Management (WFM), and Enterprise Resource Planning (ERP) ecosystem. We will then recommend integrations to or from Shiftboard that would provide workflow automation and data management optimization benefits. The Integration Discovery delivers recommendations for integration solutions beyond the self-service integrations included in the onboarding package (above). However, the design and deployment of such solutions are additional scope that would be agreed upon in a supplemental Statement of Work.

Integration Discovery includes:

- Up to 8 hours of discovery interviews with customer resources
- Creation of integration findings/recommendations summary presentation
- Creation of supplemental Statements of Work for additional direct custom integrations

Integration Discovery does not include:

- Review of integration requirements between non-SchedulePro systems
- Review of integration requirements not supported by core SchedulePro features and data entities
- Design, build, test, and deployment of integrations themselves

The Integration Discovery will confirm if extended feature and/or integration customs requests are still compatible with the purchased onboarding package scope per this document. If they are incompatible, an SOW for implementation may also be required.

Enhanced onboarding support

Premium packages also extend the standard onboarding support to meet the needs of larger and/or unionized organizations as follows:

- Larger and/or unionized organizations benefit from walkthroughs of planned solution design with stakeholder groups outside of the core project team. Such walkthroughs can be held to communicate or sign off on changed workflows or rules. Premium packages include services for up to two such walkthroughs and explanations of planned design (but any changes to planned design stemming from those walkthroughs may trigger change requests).
- Larger and/or unionized organizations typically conduct more formalized user acceptance testing on the delivered solution, executing pre-defined test scenarios and confirming results. Such testing may require the training and support of a broader team to conduct this testing effort. Premium packages include testing workshops to plan and script customer testing activities, as well as regular check-ins to monitor testing progress and provide updates on issues/gaps identified.
- Larger organizations have a larger population of scheduler and supervisor end users to be trained. As such, premium packages include a second end-user train-trainer session that can be delivered either on-site or remotely.

Add-On Onboarding Services That May Be Combined with Packages

Overview

These add-on services are not included in the core onboarding packages but can be purchased additionally:

- Additional scheduling automation (5 workflows package): This package allows you to extend your SchedulePro solution to cover more complex scheduling workflows.
- Timesheet setup: This feature allows you to track time and add payroll content to the schedule data
- Up to two non-standard interfaces or custom features can be added to a fixed onboarding package. These solutions need to be independently quoted and scoped to be implemented with an onboarding package.

The onboarding services associated with these add-on services (where purchased) are defined below.

Scheduling Workflows

Introduction to Scheduling Workflows

Workflows can vary by Group and by scheduling stage. Depending on your scheduling processes, these workflows can be adjusted based on your workforce (full-time, part-time, etc.) and prioritization rules.

Scheduling workflows can be partially or fully automated. A fully automated scheduling workflow is a mechanism in SchedulePro to automatically fill an unassigned shift while respecting the manager's scheduling decision process. A partially automated scheduling workflow will provide a level of automated assistance to the scheduler in the assignment process. Workflows frequently vary by Group, and multiple workflows in a category can be used at different stages of the scheduling process.

The table below describes the three main categories of workflows available in SchedulePro:

Category	Examples
Reassign on-shift	Reassignment from overstaffed to understaffed or low priority to critical requirements. Can include shuffling
Find extra coverage	Callout list, rotation coverage, vacation call-back, volunteer OT, shift bidding, shift pickup Prioritization mechanisms vary and can be complex: pooled hours, position-specific priorities, callout history
Split requirements	Shift split and append to other shifts, shuffle and divide

Do I need to purchase additional scheduling workflows?

Generally, we do not recommend that you purchase these in advance. The core onboarding packages discussed in this document are designed to satisfy the core automation needs of most customers. We recommend you automate your core workflows first: more advanced workflows can always be performed manually for a period of time. If additional workflows are needed, they are generally best implemented after a period of 'bedding in' using the core workflows. If you face any of these types of situations, additional workflows may be beneficial:

- You have more distinct groups with their own schedulers and process than are covered by your onboarding package
- If your scheduling needs or processes vary materially by job/position
- If you are using multiple volunteering or call-in mechanisms to address labor shortages
- If you have complex processes to ensure equitable overtime allocation

How are additional scheduling workflows implemented?

If purchased in advance, Shiftboard will implement these workflows within the initial onboarding following the above project methodology. If purchased during the project or after go-live, Shiftboard will perform a separate discovery/design/configure and test cycle for the additional workflows. Customer and Shiftboard responsibilities within each phase remain as presented above.

Timesheets Setup

If purchased in advance, Shiftboard will implement Timesheets within the initial onboarding following the project methodology presented above. If purchased during the project or after go-live, Shiftboard will perform a separate discovery/design/configure and test cycle to implement Timesheets. Customer and Shiftboard responsibilities within each phase remain as presented above.

Non-Standard Interfaces and Custom Features

Up to two such solutions can be combined with any onboarding package. Where purchased, a separate Statement of Work will be agreed upon that scopes the solution and provides a quote for the effort. A separate Statement of Work or Change Order may be needed for complex custom solutions to cover the discovery and design effort required to finalize a proposed solution.

If purchased in advance, Shiftboard will implement and deploy non-standard interfaces and custom features within the initial onboarding following the project methodology presented above. If purchased during the project or after go-live, Shiftboard will perform a separate discovery/design/configure and test cycle to implement and deploy non-standard interfaces and custom features. Customer and Shiftboard responsibilities for such work will be defined within the provided Statement of Work or Change Order.

Customer Project Resource Guide

The following guide describes typical team responsibilities and required weekly effort (note that the three packages have different projected durations). Note that many onboardings only require a subset of these resources.

Role	Responsibilities	Hours per week
Project Sponsor	Program sponsorship, vision, decision authority and approval Change management leadership and drive required process changes	0-2
Project Manager	Oversee assignments and deliverables, schedules, status, and reporting Identify and manage client-side issue resolution including change management	4-8
Business Analyst	Prepare and manage organizational data for migration into SchedulePro Maintain specifications for project: provide information on best practices	4-8
Subject Matter Experts	Prepare and manage organizational data for migration into SchedulePro Define business requirements for scheduling features, rules and workflows Implement business process changes to support the use of SchedulePro	4-8
SchedulePro Focal Point	Become expert on SchedulePro functionality in system administrator role Act as first-level internal support for SchedulePro with users post go-live	4-8
Integration Specialist [Optional]	Knowledgeable in Workforce / Human Capital Management Systems that SchedulePro will interface with and resolve technical issues	0-4
IT Personnel [Optional]	Manage internal security processes and approvals such as single sign on Resolution of IT technical matters	0-4
Trainer	Become expert in SchedulePro use cases for your organization Train Scheduler, Supervisor and Employee end users at go-live	2-4

Change Request Management

Overview

The SchedulePro solution can deliver configured features, rules, and workflows through the above-mentioned implementation process. The package implementation scope includes enabling and configuring currently available SchedulePro features, rules, and workflows. It is expected that some differences in Customer legacy systems and processes will be encountered during this process. Generally, these differences will be addressed by adjusting current work processes to the SchedulePro solution.

Package implementations are delivered to the fixed scope defined above for the fees specified in your order form. Note that package implementations assume that no customizations are required, the customer responsibilities as defined above are fulfilled, project assumptions hold as documented above, no unforeseen delays are encountered, and that customer resources remain available for the project duration.

The Change Request Management process exists to manage situations where the customer would like to add to the purchased implementation package scope and/or address a scenario where core implementation package assumptions are found to have been materially invalidated. The Change Request Management process governs and approves the scoping and funding of such work to be delivered in concert with the previously purchased implementation package.

Change Request Management Process

Either Customer or Shiftboard may identify if a change management review should be held because one or more of the conditions above apply and can request a meeting to discuss next steps. Should there be mutual agreement following that meeting that a change order is required, Shiftboard will draft and present the proposed change order scope to the customer. Should the change order not be agreed to, the implementation can continue following the original package scope and assumptions.

Adjustments to project scope can be formalized in one of two manners:

- A supplemental sales order that includes a packaged add-on feature or service. These add-ons are billed as fixed fee amounts on a sales order and include a scope that is defined in the relevant section of this document. Examples of such add-ons are Additional Automation packs and Timesheet setup.
- A Statement of Work or Change Order for custom feature and interface development and/or implementation services. Shiftboard will perform a separate discovery/design/configure and test cycle to implement and deploy any non-standard interfaces and custom features. The Statement of Work or Change Order will define a detailed design and cost proposal for the services and deliverables to be provided. Certain change requests that involve customizations may involve increases in maintenance charges: if pertinent, this impact will be specified in the change request. Customer and Shiftboard responsibilities for such work will be defined within the provided Statement of Work or Change Order.

Any implementation scope gaps will be summarized in a change request form for review and approval as a change to project scope. Documented approval by both Customer and Shiftboard is required to move forward to implement a change request.