



SchedulePro Onboarding Packages

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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 five types of implementation packages for SchedulePro:

Package	Focus / Purpose	What's included
Pilot Onboarding	'Proof of Concept' to define future multi-site deployment with Premium implementation services Goal: 60 days to go-live	All Enterprise edition standard features Up to 2 depts with distinct scheduling processes 'Day of' staff reassignment automation Add coverage: 2 call-in or volunteer processes per dept Guided testing, end-user training development and delivery
Enterprise Onboarding	Best practice single-instance full deployment of Enterprise edition features Goal: 80 days to go-live	All Enterprise edition standard features, standard integrations and core workflows Up to 3 depts with distinct scheduling processes 'Day of' staff reassignment automation Add coverage: 3 call-in or volunteer processes per dept
Enterprise Premium Onboarding	Enterprise Onboarding with Premium implementation services	As for Enterprise onboarding PLUS guided testing, end-user training development and delivery
Enterprise Plus Onboarding	Best practice single-instance full deployment of Enterprise+ edition features Goal: 100 days to go-live	All Enterprise Plus edition standard features, standard integrations and core workflows Up to 3 depts with distinct scheduling processes 'Day of' staff reassignment automation Add coverage: 3 call-in or volunteer processes per dept
Enterprise Plus Premium Onboarding	Enterprise Plus Onboarding with Premium implementation services	As for Enterprise onboarding PLUS guided testing, end-user training development and delivery

All packages include a full onboarding lifecycle service with standard integrations for one SchedulePro instance.

For Union customers or customers with more than 500 employees, the Shiftboard project team will provide extended support in the critical phases of the project. This includes testing workshops, end-user trainings and additional PM hours per week.

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 goal of the implementation is to minimize or eliminate customizations and data migrations. Instead, by using features available out of the box, the implementation can be completed as rapidly and cost effectively as possible.

This document defines the scope of these services and the associated set of customer tasks that your team will typically engage on. Each of the above packages is explained below and the onboarding scope and assumptions common to all packages is presented.

Pilot onboarding package

Shiftboard's Pilot onboarding package provides a proof-of-concept implementation for up to 2 departments. The package enables all Enterprise edition standard features, standard integrations, and core workflows. The Pilot onboarding delivers a best practice solution based on industry needs and your scheduling processes that can be reused in future site rollouts. A typical Pilot onboarding will last from eight to ten weeks from kick-off to go-live.

The package includes automation of core workflows for up to 2 departments with distinct scheduling processes. Core workflows include workflows for 'day of' restaffing that reassign on-shift staff for overstaffed and/or non-critical positions. The package also includes automating up to 2 processes per department for extra-coverage via call-ins or volunteering.

Examples of extra coverage processes that might be automated in the Pilot package include:

- Staff self-service to pick up OT shifts
- Assignment of OT volunteers to a shift staff is qualified and available for
- Assignment of Forced OT to a shift staff is qualified and available for

The scheduling workflows to be automated can be finalized during onboarding discovery sessions.

The Pilot Implementation package includes the Shiftboard Premium implementation services as defined in the Project Tasks and Deliverables section below.

Enterprise and Enterprise Premium onboarding packages

Shiftboard's Enterprise onboarding packages provides a full onboarding for up to 3 departments at a customer site. The packages enable all Enterprise edition standard features, standard integrations, and recommended workflows. The Enterprise onboardings deliver broader scheduling workflow automation that allows for functions such as automatically rotating employees through a range of jobs. A typical Enterprise or Enterprise Premium onboarding will last from eleven to thirteen weeks from kick-off to go-live.

These packages include automation of recommended workflows for up to 3 departments with distinct scheduling processes. Core workflows include workflows for 'day of' restaffing that reassign on-shift staff for overstaffed and/or non-critical positions. These packages also include automating up to 3 processes per department for extra-coverage via call-ins or volunteering.

Examples of the 'day of' restaffing and extra coverage processes that might be automated in these packages include:

- 'Day off' staff requirement automation:
 - Reassignment of on-shift staff for overstaffed and/or non-critical positions
 - Reassignment of on-shift staff based on home line
- Adding extra coverage:
 - Assignment of part time staff based on qualifications and availability
 - Staff self-service to pick up OT shifts
 - Assignment of OT volunteers to a shift staff is qualified and available for
 - Assignment of Forced OT to a shift staff is qualified and available for
 - Division and assignment of OT shifts to qualified and available staff

The scheduling workflows to be automated can be finalized during onboarding discovery sessions.

The Enterprise Premium Implementation package includes the Shiftboard Premium implementation services as defined in the Project Tasks and Deliverables section below. The Enterprise Implementation package does not include these services assuming that these activities will be driven by the Customer team.

Enterprise Plus and Enterprise Plus Premium onboarding package

Shiftboard's Enterprise Plus onboarding packages provides a full onboarding for up to 3 departments at a customer site. These packages enable all Enterprise Plus edition standard features, standard integrations, and recommended workflows. The Enterprise Plus onboardings delivers 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 from fourteen to sixteen weeks from kick-off to go-live.

These packages include automation of recommended workflows for up to 3 departments with distinct scheduling processes. Core workflows include workflows for 'day of' restaffing that reassign on-shift staff for overstaffed and/or non-critical positions. These packages also include automating up to 3 processes per department for extra-coverage via call-ins or volunteering.

Examples of the 'day of' restaffing and extra coverage processes that might be automated in an Enterprise Plus package include:

- 'Day off' staff requirement automation:
 - Reassignment of on-shift staff for overstaffed and/or non-critical positions
 - Secondary duties assignments or checks
- Adding extra coverage:
 - Staff self-service to pick up OT shifts
 - Automated callouts for planned OT assignment
 - Assignment of OT volunteers to a shift staff is qualified and available for
 - Assignment of Forced OT to a shift staff is qualified and available for
 - Division and assignment of OT shifts to qualified and available staff

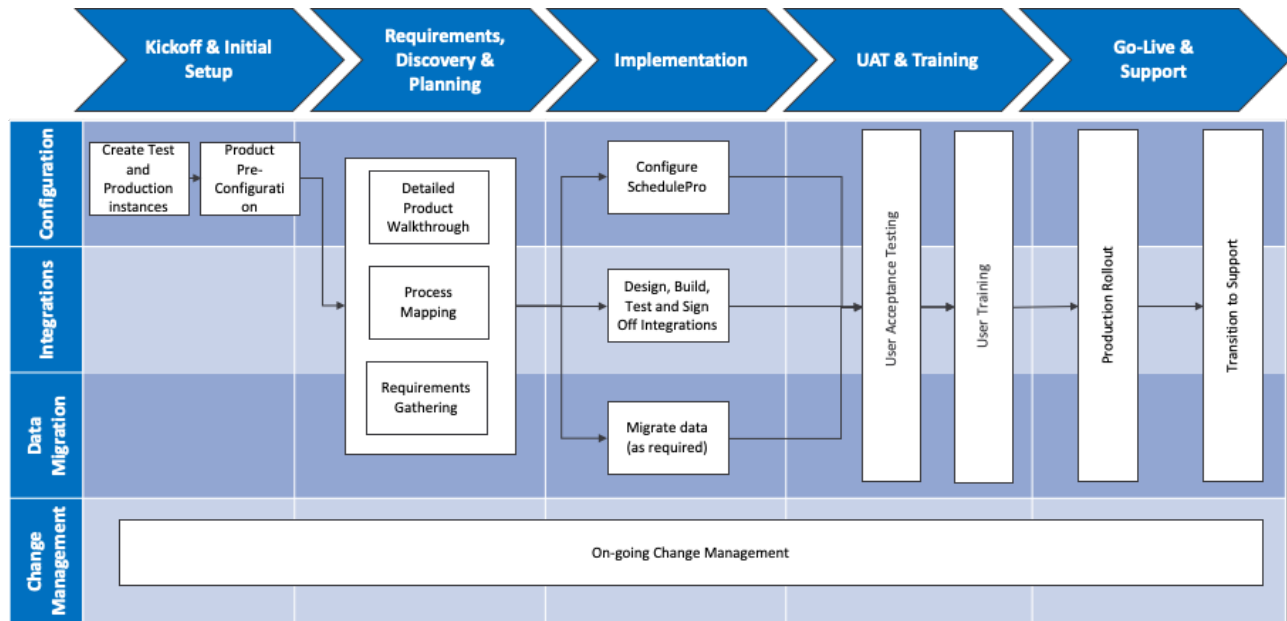
The scheduling workflows to be automated can be finalized during onboarding discovery sessions.

The Enterprise Plus Premium Implementation package includes the Shiftboard Premium implementation services as defined in the Project Tasks and Deliverables section below. The Enterprise Plus Implementation package does not include these services assuming that these activities will be driven by the Customer team.

Onboarding services included in all packages

Implementation Methodology

For all packages, onboarding services will be delivered using the methodology defined below. These services include project management, initial data gathering, discovery, configuration, user acceptance testing support, training, and cutover support.



SchedulePro onboarding is delivered in five phases:

1. **Kickoff & Initial System Setup (Initiating):** in this phase we agree a timeline that drives toward an agreed go-live date, and set up a simplified version of your schedule in SchedulePro
2. **Discovery & Requirements Gathering (Planning):** Shiftboard will conduct a single discovery workstream covering all functional groups. Several discovery sessions will allow us to gather workflows, feature requirements, overtime/extra-time rules, fatigue and work rules requirements. The discovery sessions are held remotely, however onsite sessions are an option for an additional charge.
3. **Implementation (Execution & Control):** Based on your use-case, we configure the final solution and validate it with you.
4. **Training & User Acceptance Testing (Validation & Training):** Shiftboard will support you through the UAT phase by providing detailed testing templates and review with you the issues/gaps identified. Some training sessions will also be organized to train the managers and the employees.
5. **Go-live & Transition to Support (Deployment & Closeout):** Once your team is trained in the Shiftboard solution, Shiftboard will guide you through the go live activities. After a month of Hypercare, the project team will be transitioned to our support team.

After you complete your onboarding the Shiftboard Customer Success team will support your solution adoption through to the end of your first subscription year. We will conduct regular health check and optimization calls to review usage and support you towards achieving your initial goals.

Standard Integrations

All onboarding packages include four standard Inbound integrations:

Standard Integrations	Description
Employee Import	Maintain new hires, employee updates, terminations
Skills import	Add and update Skills/Qualifications for employees
Production schedule import	Generate requirements for dynamic scheduling scenarios for a new period
Time off import	Add and update approved time off for employees to reflect in schedule

These are flat file data imports performed nightly. The data schema for each import is fixed: customers need to provide data in the approved format and are responsible for data quality in order for these integrations to be implemented within the onboarding package.

The data schema for each import will be shared during with you at the beginning of the onboarding and the Shiftboard onboarding team will work with your team to help you map the data into SchedulePro's templates.

In addition to the four standard integrations above, 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](#).

Team Commitment

Shiftboard is committed to providing all customers with an industry-leading onboarding program. We dedicate significant resources to your account to complete the Implementation process in a timely and efficient manner. However, due to resource constraints and to best serve all customers, we are unable to provide unlimited team access. All training and support in this package will expire 180 days from contract execution. Additional services are available after this time for additional cost, please contact your Account Manager for additional details.

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
Project Management	Ongoing project management	<ul style="list-style-type: none"> ○ Shiftboard will facilitate status review calls for the duration of the project. These will be held weekly, or more frequently at periods if needed for open issues and tasks management. 	<ul style="list-style-type: none"> ○ Attend all scheduled project status reviews and complete requested actions
Project Kickoff	Kick Off document with Project timeline	<ul style="list-style-type: none"> ○ Introduce Shiftboard project team ○ Clarify implementation methodology, process and joint accountabilities along with critical success factors ○ Summarize project description, goals and conduct 	<ul style="list-style-type: none"> ○ Introduce client project team ○ Confirm project stakeholders ○ Confirm project goals, joint accountabilities and timelines
Base Schedule	Employees' Regular Working Schedule recreated	<ul style="list-style-type: none"> ○ Provide base data and mapping templates ○ Review base system data requirements including shift times, shift patterns, ranks/ positions, locations/jobs and employees ○ Review data mapping including allowable ranks/positions and locations/jobs by employee ○ Support system setup including loading and validation of base system data and mapping information 	<ul style="list-style-type: none"> ○ Gather shift times, shift patterns, ranks/positions, locations/jobs and employee list from SMEs and HR ○ Gather allowable ranks/positions and locations/jobs by employee from SMEs or training system ○ Complete base data and mapping templates for upload ○ Test and validate system data and base schedule creation
Discovery	Project Scope and System Configuration	<ul style="list-style-type: none"> ○ Lead requirements gathering sessions with SMEs ○ Conduct a single discovery workstream covering all functional groups. Discovery will require several sessions to complete. ○ Gather overtime/extra-time rules, fatigue and work rules requirements ○ Gather workflow and feature requirements ○ Prepare gap analysis ○ Summarize project scope and proposed system configuration. Configured features, rules and workflows will be constrained by the purchased SchedulePro edition and onboarding package 	<ul style="list-style-type: none"> ○ Define, schedule and ensure participation by SMEs ○ Review current rules, policies and procedures ahead of discovery ○ Confirm that all documented requirements are addressed through agreed solution design and/or planned customizations with no remaining gaps ○ All functional groups attend each discovery session for their instance ○ Sign off on the System Requirements document which will become the foundation for your SchedulePro compliance guarantee
Configuration	System Configuration	<ul style="list-style-type: none"> ○ SchedulePro features (including scheduling automation and employee self-service) and required SchedulePro rules will be configured according to the System Requirements document completed during the discovery process 	<ul style="list-style-type: none"> ○ Test and validate system configuration matches the signed System Requirements

Phase	Key Deliverables	Shiftboard Responsibilities	Customer Responsibilities
User Acceptance Testing	User Acceptance of End-To-End System Readiness	<p><u>All onboardings:</u></p> <ul style="list-style-type: none"> ○ Provide base test case to help drive testing activities ○ Track and resolve gaps identified <p><u>Pilot and Premium onboardings:</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 onboardings:</u></p> <ul style="list-style-type: none"> ○ 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 SchedulePro compliance guarantee <p><u>Non Pilot/Premium onboardings:</u></p> <ul style="list-style-type: none"> ○ Ensure complete and accurate testing of all features, rules and workflows by the customer testing team
End-user training		<p><u>All onboardings:</u></p> <ul style="list-style-type: none"> ○ Develop training materials for administrator / scheduler / supervisor training for up to ten customer requested specific scenarios. Training materials will cover administrator, scheduler, and worker functions within SchedulePro ○ Deliver one administrator / scheduler/supervisor training for up to ten attendees split into four two-hour remote sessions. The training will be recorded for reuse and tuition materials provided. ○ Manage and provide timely responses to any issues identified during training <p><u>Pilot and Premium onboardings:</u></p> <ul style="list-style-type: none"> ○ Shiftboard will deliver on-site direct scheduler/supervisor and worker training delivery for up to two scheduler/supervisor and two worker groups, with a maximum of 10 attendees per session ○ Training sessions will be delivered within a total on-site duration of up to 2.5 days. This approach allows training sessions to overlap two different shift changes. ○ Two Shiftboard instructors will deliver training content and provide individualized support to trainees during hands-on sessions ○ Travel expenses for on-site training will be billed additional to package fees. 	<p><u>All onboardings:</u></p> <ul style="list-style-type: none"> ○ Determine end-user training attendees, publish training sessions, and ensure their attendance to relevant sessions. ○ Have end-user trainers attend Shiftboard delivered administrator / scheduler / supervisor training which will serve as a train-trainer class to enable the customer team to deliver additional or future such trainings themselves ○ Plan and deliver any remaining required training to end-users (Schedulers/Supervisors/Workers) after attending initial training sessions from Shiftboard ○ Develop any required end-user training materials beyond the SchedulePro functional guides from Shiftboard (e.g. business workflow instructions) ○ Track end-user questions, issues and feedback to be shared with Shiftboard ○ Communicate responses and problem resolution details to users
Transition to Go-Live	Cutover to Production	<ul style="list-style-type: none"> ○ Setup and migrate data to production ○ Provide go-live checklist ○ Provide timely response to any issues identified 	<ul style="list-style-type: none"> ○ Plan and manage go-live roll-out ○ Support roll-out and change management ○ Communicate responses and problem resolution details to users
Support	Help Process Handoff	<ul style="list-style-type: none"> ○ Onboarding team will provide hyper-care support for a one-month period following go-live. ○ Transition to customer success and support ○ Provide support procedures 	<ul style="list-style-type: none"> ○ Communicate internal support process ○ 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 duration of the project.
- Project resources are allocated sufficient time to dedicate towards 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, 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 scope of the SchedulePro implementation:

- 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 integrations
- Extensive or complex custom totals thresholds
- Advance Rest Days features
- Light workload unassignment
- Ongoing review of union contract / policy documents beyond initial discovery assessment
- Current state workflow mapping, process improvement recommendations or business re-engineering 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

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 allows you to extend your SchedulePro solution to cover more complex scheduling workflows.
- Timesheet set-up: enabling 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 each of these add-on services (where purchased) is defined below.

Scheduling Workflows

Introduction to Scheduling Workflows

Workflows can vary by department and by scheduling stage. Depending on your scheduling processes, these workflows can be adjusted based your workforce (full time, part time...) and your 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 department and multiple workflows in a category can be used at different stages of the scheduling process.

The table below describes the 3 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 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:

- Three or more departments have and will have their own schedulers and their own process
- 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 project methodology presented above. 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 for such solutions that scopes the solution and provides a quote for the effort. For complex custom solutions a separate Statement of Work or Change Order may be needed to cover the discovery and design effort needed 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 effort per week (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 [Required]	<ul style="list-style-type: none"> Provide Executive sponsorship and approval Provide project vision and direction Provide decision authority Ensure availability of sufficient qualified resources and project funds to meet project timeline Provide change management leadership 	0-2
Project Manager [Required]	<ul style="list-style-type: none"> Oversee daily activity of project including assignments and deliverables Responsible for schedules, status and reporting Ownership of project success from planning perspective Weekly status meetings held with implementation team Identify and manage client-side issue resolution and escalation with implementation team including any change management concerns 	4-8
Business Analyst [Required]	<ul style="list-style-type: none"> Prepare and manage organizational data for migration into SchedulePro Create and maintain specifications for project Provide information on best practises Provide a bridge between IT and functional stakeholders 	4-8
Subject Matter Experts [Required]	<ul style="list-style-type: none"> Provide subject matter expertise in the following areas: <ul style="list-style-type: none"> Business use cases and functional insights concerning scheduling rules and workflows, fatigue, work rules and any other information pertinent to your workforce management process Suggest business process changes to support the use of SchedulePro 	4-8
SchedulePro Focal Point [Required]	<ul style="list-style-type: none"> Become expert on SchedulePro functionality and system administrator Act as first level internal support for SchedulePro with users post go-live 	4-8
IT Personnel [Optional]	<ul style="list-style-type: none"> Manage internal security process and approvals such as single sign on Resolution of IT technical matters 	0-4
Trainer	<ul style="list-style-type: none"> Become expert in their SchedulePro role Support go-live in training end users to facilitate Shiftboard’s train-the-trainer approach during rollout. <i>Note: This role may not be required in Pilot and Premium onboarding packages since Shiftboard may act in this capacity during implementation. However it is still advisable to designate one customer team member for this role to train new hires after go-live.</i> 	2-4

Change Management

Overview

SchedulePro is a commercial off-the-shelf solution with the ability to deliver configured features, rules and workflows through the implementation process defined above. The package implementation scope includes enablement and configuration of currently available SchedulePro features, rules, and workflows. During this process it is expected that some differences to Customer legacy systems and processes will be encountered. 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 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 Management process governs and approves the scoping and funding of such work to be delivered in concert with the previously purchased implementation package.

Change 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 implementations 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