



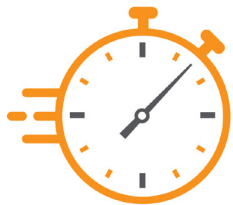
# ConstructionOnline™ **Smart Start**

Onboarding & Implementation Success Program

## Get Started on the Right Foot.

As a construction software solutions provider for over 750,000 users worldwide, UDA Technologies understands that investing in the right project and personnel management platform is a tremendously important decision.

We also know that decision does not end when you subscribe to ConstructionOnline. Your journey to success with the platform is just getting started.



### Smart Start Success Plan

Our Success Program will accelerate the technology value of the platform to your company and will help you manage the rollout of the platform's many tools and features.



### Dedicated, Expert Guidance

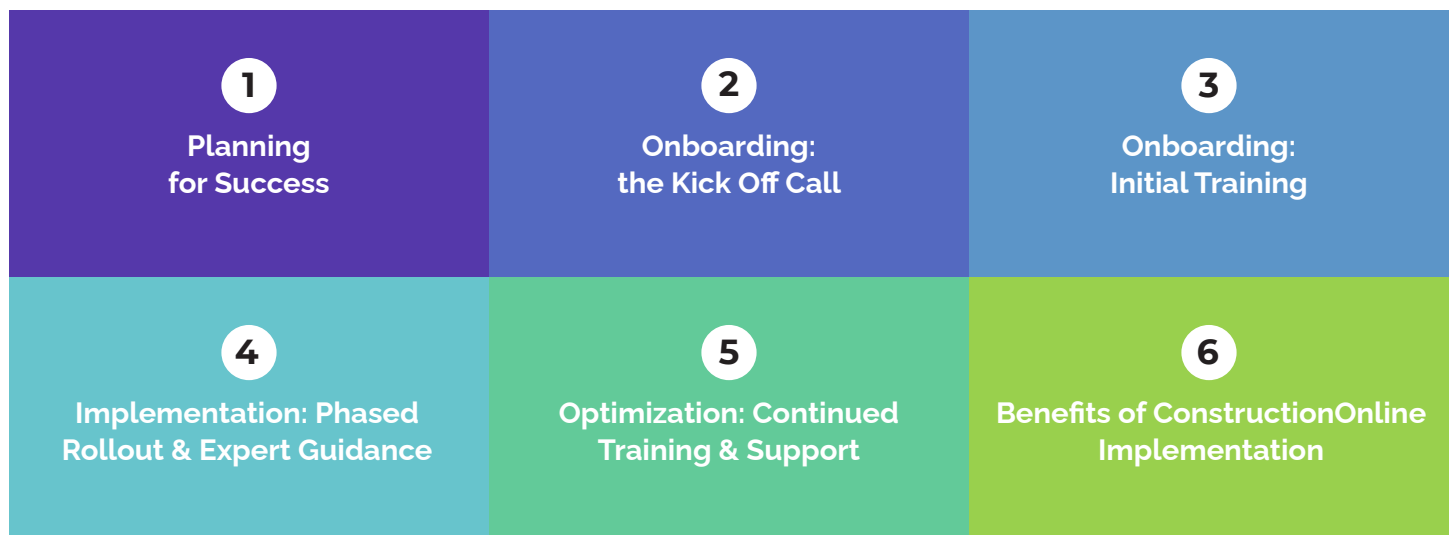
Your dedicated Customer Success Manager will work with you to develop and execute your personalized ConstructionOnline Plan for Success, and assist with data migration and template setup.



### On-Demand Training

Your ConstructionOnline subscription includes ongoing access to training sessions from our product experts, so you and your team can reap the benefits of the platform for years to come.

## 6 Steps for Success:



# Start Smart, Implement Faster.

When our clients succeed, UDA Technologies succeeds. Our Customer Success team works together with our clients to develop and execute a customized Plan for Success. Following the plan results in better standards, more efficiency, and a faster return on investment.

Phase 1: Onboarding	Phase 2: Implementation	Phase 3: Optimization
<b>1a. Onboarding Preliminaries</b> <ul style="list-style-type: none"><li>✓ Schedule Kick Off Call with your team</li><li>✓ Activate your Construction-Online Company Account</li><li>✓ Login with established key user accounts</li><li>✓ Begin technical setup</li></ul> <b>1b. Kick Off Call</b> <ul style="list-style-type: none"><li>✓ Establish goals and objectives</li><li>✓ Define implementation milestones</li><li>✓ Create collaborative Plan for Success</li></ul> <b>1c. Initial Training</b> <ul style="list-style-type: none"><li>✓ Orientation: first meeting to review platform setup and first priority tasks</li><li>✓ Weekly training: meetings over 2-4 weeks to create standardized processes and tools</li></ul>	<b>2a. Phased Rollout</b> <ul style="list-style-type: none"><li>✓ Scale usage of platform to encompass entire project management process</li><li>✓ Continuing training sessions as needed to refine Initial Training</li><li>✓ Role-specific training as needed to prepare for team-wide rollout</li><li>✓ Track project progress with built-in business intelligence features</li></ul> <b>2b. Expert Guidance</b> <ul style="list-style-type: none"><li>✓ Quarterly Reviews: Scheduled meetings with dedicated Customer Success Manager to review progress toward long-term goals</li></ul>	<b>3a. Training and Support</b> <ul style="list-style-type: none"><li>✓ Unlimited online / phone technical support and user guidance</li><li>✓ Continued training for new users and refresher training</li><li>✓ Weekly online classes / webinars</li><li>✓ Self-paced training videos</li><li>✓ On-site training options</li></ul>

## Phase 1: Onboarding



### Step 1: Onboarding Preliminaries

UDA Technologies understands that planning and execution are foundational to the success of any project. Your Customer Success Manager will help you through each phase of your Plan for Success and make sure everyone is working toward the same goals and objectives.

#### Recommended Tasks for Your Team:

- ☒ Schedule Kick Off Call with high-level personnel in charge of implementing ConstructionOnline
- ☒ Provide UDA Technologies with your company logo and letterhead files to personalize your Company Account
- ☒ Attend the Kick Off Call

#### Your Customer Success Manager Will:

- ☒ Schedule Kick Off Call
- ☒ Activate your ConstructionOnline Company Account
- ☒ Establish and share key account credentials
- ☒ Assist with technical setup, including letterhead and logo branding



### Step 2: Onboarding Preliminaries

The Kick Off Call is critical to maximize your ConstructionOnline investment. Your Customer Success Manager will work with you to define success on your terms, develop goals and priorities, and establish milestones, checkpoints, and an adaptive ConstructionOnline implementation timeline.

#### Recommended Tasks for Your Team:

- ☒ Ensure that key personnel attend the Kick Off Call
- ☒ Share completed Plan for Success with internal stakeholders

#### Your Customer Success Manager Will:

- ☒ Create your Plan for Success
- ☒ Establish goals and objectives for your team
- ☒ Define implementation timeline, milestones and checkpoints
- ☒ Discuss processes and workflows



### Step 3: Initial Training

Executing your Plan for Success begins with initial training sessions to learn how to use ConstructionOnline to achieve your goals. Over multiple online meetings your team will grow competent in core areas - project management, sales processes, time management, and more.

#### Recommended Tasks for Your Team:

- ✓ Continually review your Plan for Success and challenge your team to work towards priorities
- ✓ Focus on no more than two implementation goals at a time during initial training

#### Your Customer Success Manager Will:

- ✓ Schedule one orientation session to introduce platform and priorities
- ✓ Hold weekly training sessions for the next 2-4 weeks with key personnel
- ✓ Assist with data migration and other imports

## Phase 2: Implementation



### Step 4: Phased Rollout

During the Phased Rollout step of your Plan for Success, UDA Technologies provides unlimited training and support to help refine and scale your newly implemented processes. You and your team will continue to scale usage of ConstructionOnline and the mobile app to encompass your entire project management workflow.

#### Recommended Tasks for Your Team:

- ✓ Scale usage of ConstructionOnline to encompass the entire project management workflow
- ✓ Track project progress with built-in business intelligence features
- ✓ Monitor team performance with personnel management tools

#### Your Customer Success Manager Will:

- ✓ Provide measured steps for seamless platform rollout to your team
- ✓ Provide unlimited, on-demand training sessions to refine and scale new processes



### Step 5: Expert Guidance

At UDA Technologies, our goal is your success, which is why each customer is paired with a dedicated Customer Success Manager. Our Customer Success team will work to understand your business and how to make the most of your investment in ConstructionOnline, both during initial implementation and for years to come.

#### Recommended Tasks for Your Team:

- ✓ Attend Quarterly Review meetings to discuss progress and long-term goals
- ✓ Encourage team at all responsibility levels to continue mastering the ConstructionOnline toolset

#### Your Customer Success Manager Will:

- ✓ Schedule Quarterly Review meetings to provide assistance in achieving long-term goals

## Phase 3: Optimization



### Step 6: Ongoing Training and Support

UDA Technologies is proud to offer top-rated technical support, resources for continued learning, and training for all new and current customers. Access to these resources will always be available to ConstructionOnline customers, no matter their level of experience.

#### UDA Technologies Customer Success Resources

- Unlimited access to the UDA Technologies Technical Support team
- Live Chat and [Help Articles](#)
- Training for new users and refresher training
- [Weekly online live classes / webinars](#)
- Self-paced training video library
- On-site training options available
- Email support 24/7 at [support@udal.com](mailto:support@udal.com) or call us toll free at 1-800-700-8321





## ConstructionOnline Smart Start Benefits:

### Faster Return on Investment

Implementing ConstructionOnline does not need to be a complicated ordeal. Our phased implementation plan and user-friendly platform make it easy to start getting value soon after your subscription begins.

### Increase Operational Efficiency

As you work toward achieving your goals, the new workflows and processes you implement will begin to streamline your daily operations.

### Leverage Subject Matter Expertise

Our Customer Success team has partnered with thousands of construction companies around the world and gained deep understanding of best practices and workflows of contractors in many industry segments. These lessons learned will be shared with you during your implementation and beyond.

# Trusted by Over 750,000 Construction Pros.

With hundreds of thousands of users in the US, Canada, and more than 75 countries worldwide, UDA Technologies delivers the most widely used project management systems for construction firms seeking to boost profits and build smarter.

*Buy the product, it truly has increased my bottom line. Hands down this is not only paying for itself, it is paying for itself 10 fold.*

— Lambert Builders

*Constantly improving. Best tool we are using in our commercial GC business. Redline™ Planroom, RFIs, Submittals - pretty much all of the commercial tools are invaluable to me.*

— Inner-Tech, Inc.

*It's like having several more employees with just a few clicks of the mouse.*

— Sloan General Contracting Corporation

*ConstructionOnline is an important part of my business and I use it for everything from estimating to presentation to contract to completion of project.*

— Blue Mountain Builders

*ConstructionOnline is a one stop organizer as well as a perfect way to keep all involved on the same page with the click of a button.*

— Mahto Construction, Inc.



**UDA**  
**ConstructionOnline™**

For more information, please visit [www.constructiononline.com](http://www.constructiononline.com)

**UDA TECHNOLOGIES**

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