



YouTestMe

Customer Onboarding Procedure

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1 Introduction

The purpose of YouTestMe onboarding procedure is to define the schedule for the onboarding process that will allow the customer to:

- Check and confirm that YouTestMe delivered the software per customer’s requirements
- Implement the technology and acquire skills necessary to efficiently use YouTestMe GetCertified

The onboarding process starts with the placement of the purchase order and is completed when the YouTestMe point of contact (POC) and the customer complete go through all of the steps of this procedure.

2 Phases of the Onboarding Procedure

2.1 Planning

In this phase, YouTestMe POC will propose a meeting to go over the following topics with the customer:

- Defining the stakeholders and coordinators of the project
- Going over the onboarding procedure
- Defining the schedule for the onboarding process

2.1.1 Questions that need to be answered in this phase

1. Who are the stakeholders and coordinators of the project?
2. What are the responsibilities of all parties involved?
3. Which items from the onboarding procedure will be included in the onboarding process?
4. What phases will the onboarding process contain, and what are their due dates?

2.2 Initial Data Load

In this phase, YouTestMe POC will:

- Check if there is any initial data that the customer would like YouTestMe to load in the system before the official delivery.

2.2.1 Questions that need to be answered in this phase

1. Does the customer need any data loaded in the system before the official delivery?
2. If yes, how much data and what data?
3. Which format will the customer use to send the data to YouTestMe?
4. What will be the phases and the due dates for the process of importing initial data?
5. During the UAT phase, who will confirm the quality and integrity of the loaded data from the customer's side?

2.3 Customization and Integration

In this phase, YouTestMe POC will:

- Reiterate any potential customization and integrations that were agreed with the customer
- Go over the customer's list of requirements with the customer
- Confirm the timeline for implementing the requirements

Prerequisite for discussion: List of customer's requirements.

2.3.1 Questions that need to be answered in this phase

1. What are the customer's requirements?
2. Who can YouTestMe contact to clarify any open questions if they occur during the development?
3. Will the customer be able to allocate a team that will regularly check the progress of the development in the sandbox environment and provide regular feedback to YouTestMe?
4. Who will be the individuals that will send the feedback to YouTestMe?
5. During the UAT phase, who will confirm the quality and the integrity of the customization and integration from the customer's side?

2.4 Instructional Materials

In this phase, YouTestMe POC will:

- Share the training materials with the customer:
- Check if any specific "How to" documents should be provided

2.4.1 Questions that need to be answered in this phase

1. Does the customer have any specific use case scenarios that are not covered in the YouTestMe wiki page?

2.5 Setting up the Notifications System (for On-premise Delivery only)

In this phase, YouTestMe POC will:

- Provide the instructions to customer's system administrators on how to set up a mail provider and test the email notification system

2.5.1 Questions that need to be answered in this phase

- Does the customer's mail server support the expected data volumes, and how to adjust it if it does not?

2.6 Resilience Testing (for On-premise Delivery only)

In this phase, YouTestMe POC will:

- Provide the instructions to customer's system administrators on how to verify compatibility and capacity of the provisioned hardware infrastructure
- Share the procedure for performing resilience tests of YouTestMe GetCertified

2.6.1 Questions that need to be answered in this phase

1. Does the customer's infrastructure support the expected data volumes, and how to adjust it if it does not?

Prerequisite for discussion: Procedure for resilience testing.

2.7 User Acceptance Testing

In this phase, YouTestMe POC will:

- Share YouTestMe's recommendation for the UAT process with the customer
- Determine the milestones of the UAT process with the customer

2.7.1 Questions that need to be answered in this phase

1. Does the customer want to go through the UAT process (recommended)?
2. When will the UAT process start and end?
3. What is YouTestMe recommendation on how to check core functionalities of the system?
4. What is YouTestMe recommendation on how to check customer's requirements?

Prerequisite for discussion: List of YouTestMe recommendations for the UAT phase.

2.8 Customer Sign off

In this phase, YouTestMe POC will:

- Recommend the criteria for proclaiming that system is ready for production
- Determine the criteria for proclaiming that the system is ready for production with the customer

2.8.1 Questions that need to be answered in this phase

1. Who and when will confirm that system is ready for production?

Prerequisite for discussion: List of customer's requirements.

2.9 Customer Support

In this phase, YouTestMe POC will:

- Determine the support dynamics with the customer
- Help the customer configure support-related parameters in the application

2.9.1 Questions that need to be answered in this phase

1. Who is going to be the first tier of support, and who is going to be the second and third tier of support?
2. What are the communication protocols in case assistance is necessary?
3. What is the expected response time?

2.10 Software Delivery, Installation, and Configuration

In this phase, YouTestMe POC will:

- Deliver the application to the customer
- Explain the purpose of all of the delivered environments and recommend how to use them

2.10.1 Questions that need to be answered in this phase

1. What environments are delivered, and how should they be used?

2.11 Production

In this phase, YouTestMe POC will:

- Describe the typical initial activities after going live and recommend the activities related to the customer's use case scenarios
- Describe the procedures for system monitoring to the customer

2.11.1 Questions that need to be answered in this phase

1. What are the recommended initial activities?
2. How can the customer perform system monitoring?

Prerequisite for discussion: Procedure for system monitoring.