

Getting Your Team Ready

Quick timelines or complex rollouts, our team is here to help.

With over a decade of experience, we have enterprise SaaS implementation down to a science.

From the first meeting to the final rollout and staff training, we can deliver exactly what you're looking for with minimal disruption and maximum employee adoption.

Whether you're after a fast and simple implementation or need support on more complex requirements, we work with you to tailor your experience to meet your needs.

During implementation, you'll have a dedicated team consisting of:

- An Implementation Manager who will be your main point of contact during the implementation project and after you're up and running
- And a Customer Success Manager who will work with you to provide strategic consulting and best practices to help you achieve the goals you've set out with Coconut Software



Our tried, tested and true implementation and onboarding process means smooth change management for your project team and staff. We'll align on go live dates and training requirements based on complexity and scope of project.

Then, we'll work with you to map out key dates, our suggested rollout plans and best-in-class procedures for getting your teams ready.



THE COCONUT IMPLEMENTATION & ONBOARDING EXPERIENCE

#1

Finalize Scope & Strategy

We'll align on the solutions you're implementing, key considerations and success metrics.

#2

Project Kick Off & Implementation

All the project stakeholders meet to discuss the project, roles and involvement.

#3

Training & Go Live

We'll provide live and in-product training along with resources so your staff are ready for go live day and beyond.

#4

Post Launch Support

We'll debrief and plan for ongoing informal touchpoints to make sure change management is going smoothly. We'll formally connect during Executive Business Reviews to discuss how we can help you continue to drive value from Coconut.



Choose one of three implementation packages, ranging in a basic set up with a focus on speed to go live, to a complex multi business unit program with intensive support, integrations and training. We'll work with you to determine the right package for your needs.

“15 staff members have reached out to thank me for rolling out such a helpful solution... the CFO cannot wait to expand the pilot to the entire organization.”

Vancity



About Coconut Software

Our cloud-based, enterprise appointment scheduling and visitor management platform combines your on-location and digital channels, providing self-service booking and curbside pickup, online and physical queuing, wait time tracking, callback requests and virtual meeting support as well as contact center integration.

Get up and running in only a few weeks.

COCONUTSOFTWARE.COM

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