ONBOARDING & TRAINING

CampMinder's Onboarding and Training process is designed to make you as successful as possible in your partnership with CampMinder. This process has been refined through training over 800 camps and is built on best practices we've learned along the way. We are, however, excited to learn how to better meet our clients' needs - so please give us feedback along the way to enable us to continually improve this process.

GOALS OF ONBOARDING

- To establish your goals and desired outcomes in partnering with CampMinder

- To establish a mutual understanding between you and CampMinder of what it looks like to achieve success

- To implement the CampMinder software to best meet your needs

- For your camp to gain a strong understanding of the key modules of CampMinder in order to not only use them effectively, but also teach your team how to do so

- For you to gain a strong understanding of the various contacts within CampMinder and who to reach out to for a given need

KEY POINTS

- Typical onboarding process lasts from 2 - 8 weeks

- Training sessions will typically occur 2 - 3 times a week during onboarding; any request of higher frequency will be at the discretion of the CampMinder Client Success Manager (CSM), depending on factors such as availability and your specific situation

- A document outlining onboarding steps will be provided to you by your CampMinder CSM after the initial phone call

- Apart from your one-on-one time with your CSM, training resources include Help Videos, Help Articles, and the CampMinder Digital Workbook

- Training can be scheduled on normal work days between 8AM - 4PM EST. Any requests outside of these times will be at the discretion of the CSM

EXPECTATIONS OF CLIENT

- Provide CampMinder with necessary information & resources about your organization to enable most effective setup of the system

- Attend scheduled calls at the agreed upon time or provide reasonable notice if unable to attend; a missed training can be caught-up but will need to be rescheduled

- Will use help resources/watch training videos before each session

- Will attempt to complete tasks assigned by CSM prior to each session

- Will reach out to CampMinder Support in a timely manner for bugs/defects/technical questions

- Will provide feedback to the CSM about the onboarding experience

- Choose onboarding time slots on CSM calendar using *Calendly* App

- Will be in front of a computer and logged in to CampMinder system during training

- Identify key stakeholders to attend each specific training

- Have a minimum of ONE 'champion' user who attends all training sessions.

EXPECTATIONS OF CLIENT SUCCESS MANAGER (CSM)

- Attend scheduled calls at the agreed upon time or provide reasonable notice if unable to attend; a missed training can be caught-up but will need to be rescheduled

- Setup agenda & tasks for each session

- Setup and share Video call meeting links prior to each training

- Send follow-up emails from each training reviewing what was covered and agreed upon to-dos

- Will find a replacement CSM to cover scheduled training if there is an extended period of time they won't be present, for vacation or illness

- To review client's system setup, and provide insight when multiple options are available

- Provide clarification on any of the help content that is not clear

- Assist in testing & provide feedback before the go-live of the applications