

SmartSuite Onboarding Services

A structured 4-week program to launch SmartSuite the right way



Overview

SmartSuite Onboarding is a guided, time-boxed program designed to help new customers **start strong**. Instead of figuring things out on your own, you work with a SmartSuite Engagement Manager and product specialist over approximately **4 weeks** to:

- Configure the **Solutions you've licensed** for your first use cases
- Set up **practical views and dashboards** for your teams
- Turn on **starter automations** that keep work moving
- Shape initial **roles and access**, including SSO/SCIM where supported
- Train your **key users** and plug them into SmartSuite Academy, in-product help, office hours, webinars, and the public roadmap

The goal is simple: by the end of Onboarding, your first workflows and teams are **up and running in real work**, and you have a clear path to expand into GRC, IT, PMO, and enterprise operations.



Who Onboarding is for

SmartSuite Onboarding is ideal for:

- New customers who want a **best-practice launch**, not a trial-and-error rollout
- Teams implementing SmartSuite for **GRC, IT, PMO, or operations** and need early wins
- Organizations that want their **admins and champions** ready to support others

Enterprise customers planning broader programs who still need a clean, confident first step

Faster time to value

Move from contract to live workflows in weeks instead of months, with guided sessions focused on real use cases.

Confident admins and champions

Give admins, builders, and process owners the skills and context they need to support others and own SmartSuite internally.

Best-practice starting point

Begin with Solution structures, views, dashboards, and automations shaped by patterns from other successful customers.

Less rework as you scale

Make foundational design decisions once, with guidance, so adding new workflows, teams, and regions later doesn't mean starting over.

Workflows that fit your teams

Configure Solutions around how your teams actually operate, so SmartSuite feels intuitive and useful from day one.

Clear path to what's next

Finish with a recommended plan for Solution Launch Packs, Expert on Demand (Managed Services), and additional training.

Starter Onboarding

For smaller teams or a focused first workflow.

- Configure **1-2 licensed Solutions** around a priority use case
- Set up core views and dashboards for day-to-day users and team leads
- Add a first set of simple automations (assignments, notifications, reminders)
- Define basic roles and access for your initial team
- Deliver foundational admin/builder and key-user training, plus an orientation to SmartSuite resources

Growth Onboarding

For organizations rolling out SmartSuite across multiple teams or pillars.

- Everything in **Starter Onboarding**, plus configuration of additional Solutions across GRC, IT, PMO, or operations
- Expand your roles and access model to support more teams and use cases
- Add leadership dashboards to monitor adoption and work in progress
- Implement additional automations and light integrations (e.g., email, Slack/Teams, simple webhooks)
- Include extra working sessions with process owners and internal champions

Enterprise Onboarding

For complex, multi-team or regulated environments.

- Everything in **Growth Onboarding**, plus more advanced governance and access design
- Configure SSO and SCIM (where supported by your plan) and align identity/access with internal policies
- Co-design key elements of Solution architecture for priority GRC, IT, or PMO workflows
- Implement deeper integrations (e.g., CRM, security tools, legacy platforms via iPaaS/webhooks)
- Deliver extended training (including train-the-trainer) and guided go-live support for additional teams

How SmartSuite Onboarding Works

Structured 4-week program - Onboarding is typically delivered as a 4-week series of guided working sessions. Each week focuses on a specific set of outcomes, with time for your team to apply what they've learned between sessions. For customers who need to move faster, sessions can be compressed into a shorter timeframe.

Weeks:

01

Foundations & orientation

- Introduce your initial Solutions and use cases
- Walk through navigation, records, views, and dashboards
- Discuss initial goals, data sources, and team structure
- Introduce SmartSuite Academy, in-product help, office hours, webinars, and roadmap

02

Views, dashboards & starter automations

- Configure core views for individuals, teams, and managers
- Build starter dashboards for key stakeholders
- Implement simple automations (assignments, notifications, reminders)
- Identify additional views/automations your team would like next

03

Roles, access & collaboration

- Define and configure roles and access for your initial teams
- Discuss SSO/SCIM where supported and how identity ties in
- Review collaboration patterns (comments, mentions, file attachments)
- Agree on basic governance for changes and new requests

04

First workflow & next steps

- Finalize at least one priority workflow as a real, usable process
- Review fields, views, dashboards, and automations for that workflow
- Confirm roles and access for the pilot group
- Walk through recommended Academy paths and ongoing resources
- Review next-step recommendations (Launch Packs, Expert on Demand, Training & Enablement)

(Exact structure may vary by program level and your starting point, but the goal remains the same: live workflows + empowered teams.)

Onboarding Deliverables

By the end of Onboarding, you can expect to walk away with:

- **Configured starter Solutions** for 1–2 priority workflows
- **Views & dashboards** tuned for users, managers, and leaders
- **Starter automations** that keep work moving without manual chasing
- **Roles & access** defined and documented, including SSO/SCIM setup where applicable
- **Training resources** for admins, builders, and key users, plus guidance on Academy paths
- A **next-step plan** for deeper GRC/IT/PMO rollout and ongoing services

Roles & Collaboration

Customer team

- **Project/Program Owner** – overall sponsor and decision-maker
- **Admins/Builders** – responsible for day-to-day configuration after onboarding
- **Key Users/Process Owners** – provide input on workflows and test early configurations

SmartSuite team

- **Engagement Manager** – leads the onboarding program, coordinates sessions, and keeps scope/timeline on track
- **Product/Implementation Specialist** – configures Solutions, views, dashboards, automations, and access

Training & Enablement Lead (as needed) – supports training sessions and onboarding into Academy/resources

How Onboarding Fits with Other Services

- **Onboarding Services** – get your first Solutions and workflows live and your early teams productive.
- **Advisory & Implementation Services** – design your roadmap and architecture, then implement broader GRC, IT, PMO, and operations programs via Strategy Roadmap and Solution Launch Packs.
- **Managed Services (Expert on Demand)** – ongoing capacity to enhance workflows, add Solutions, maintain integrations, and adopt new features.
- **Training & Enablement Services** – deeper admin and GRC program training, plus SmartSuite Academy and certifications.
- **Premium Support** – elevated, incident-focused support with SLAs and a Technical Account Manager.

Onboarding helps you **start strong**; the rest of the Services portfolio helps you **scale with confidence**.

Quick FAQ Snapshot

How long does Onboarding take?

Typically 4 weeks with one focused session per week, with options to compress if needed.

What do we need to have ready?

Initial use cases, key stakeholders, a small core team (project owner + admins/builders), and rough ideas of your desired workflows.

What happens after Onboarding?

Most customers move into Solution Launch Packs for deeper GRC/IT/PMO rollout and consider Expert on Demand for ongoing enhancements.

Ready to plan your SmartSuite Onboarding?

Talk with your SmartSuite account team to:

- Choose the right Onboarding program (Starter, Growth, or Enterprise)
- Align Onboarding with your initial GRC, IT, PMO, or operations use cases
- Map how Onboarding will hand off into Advisory & Implementation, Expert on Demand, and Training & Enablement

Launch SmartSuite with confidence—on a foundation your teams can build on.