

SmartSuite

Expert on Demand

Managed Services for Enterprise Customers



Overview

Expert on Demand (EOD) is SmartSuite's managed services add-on for **Enterprise** customers. Instead of spinning up a new professional services project every time you need a change, you get a **fractional SmartSuite team** with a fixed number of service hours each month.

You can use those hours for whatever matters most—enhancing workflows, adding new Solutions, refining dashboards and reports, maintaining integrations, joining key meetings, and advising on your roadmap. EOD is designed to feel like SmartSuite experts are part of your extended team.

EOD is sold as a **12-month subscription add-on** to your SmartSuite Enterprise plan and is intended to be a multi-year, ARR-based program rather than one-off project work.



Who Expert on Demand is for

Expert on Demand is ideal for:

- Enterprise customers treating SmartSuite as a **strategic platform**
- Organizations with **ongoing change** across GRC, IT, PMO, and operations
- Teams that want a **fractional SmartSuite team** to support their roadmap without adding full-time headcount

Customers who prefer a **subscription-based services model** instead of a steady stream of separate SOWs



Continuous improvement, not one-off projects

Keep SmartSuite aligned with your evolving processes, programs, and regulations.



Fractional expert team

Access an Engagement Manager, Solution Architect, Product Specialists, and Integration resources as needed—without hiring them all in-house.



Flexible use of hours

Apply hours to configuration, integrations, reporting, advisory work, and high-touch support activities, rather than being locked to a narrow scope.



Faster response to change

Route enhancements and new requests through EOD and get work moving in days and weeks, not months.



Part of your Enterprise strategy

Position services as part of your ongoing operating model, not just a temporary implementation effort.

Service tiers

EOD is available in four tiers so you can match capacity to your needs:

Essentials

For smaller teams that need targeted enhancements and occasional advisory support.

Includes 10 hours per month with your Expert on Demand team.

Growth

For growing programs with regular workflow changes, new Solutions, light integrations, and periodic roadmap sessions.

Includes 20 hours per month with your Expert on Demand team.

Premium

For mature GRC, IT, or PMO programs that need ongoing enhancements, integrations, reporting improvements, and steady advisory across multiple teams.

Includes 40 hours per month with your Expert on Demand team.

Enterprise

For large or regulated environments that want a true extension of their internal team, with continuous architecture, automation, and integration work across departments and regions.

Includes 80 hours per month with your Expert on Demand team.

How expert on demand works



Hours per month

You select a tier (Essentials, Growth, Premium, Enterprise) with a set number of service hours per month for 12 months. These hours can be used flexibly across configuration, integrations, reporting, advisory work, and high-touch support.



Monthly allocation with rollover

- Hours are allocated monthly.
- Up to 50% of unused hours roll into the following month.
- Rolled hours must be used by the end of that following month or they expire.



Borrowing from future months

When you have a spike in work, your Program Owner can request to borrow hours from future months. Borrowing is approved based on SmartSuite's delivery capacity and is then reflected in your EOD dashboard, so everyone can see updated balances and remaining hours.



Cadence & planning

We set a regular rhythm that matches your tier:

- Essentials / Growth – at least **monthly** check-in
- Premium – typically **bi-weekly** working sessions
- Enterprise – usually **weekly** working sessions plus periodic deeper reviews

Between these touchpoints, you can submit new requests anytime via the portal.



What you can use the hours for

Expert on Demand is meant to feel like a fractional SmartSuite team. Common uses include:

- **Workflow enhancements** – updating fields, views, dashboards, permissions, and automations as your processes mature
- **New Solutions & Interfaces** – configuring additional Solutions as you expand SmartSuite into new teams or programs
- **Integrations** – implementing and maintaining integrations with identity providers, ticketing systems, CRMs, security tools, messaging platforms, and more
- **Dashboards & reporting** – designing and refining reports and dashboards for managers, executives, boards, and regulators
- **Product updates & feature adoption** – reviewing new SmartSuite features and releases, deciding what matters, and planning enhancements
- **Advisory & collaboration** – joining roadmap sessions, design reviews, steering committees, and high-touch troubleshooting that goes beyond standard support

Rules & collaboration

Customer Program Owner

The single point of contact on your side:

- Collects requests from internal stakeholders
- Prioritizes what matters most
- Submits new work and borrowing requests
- Joins planning/review calls and approves the plan

SmartSuite Engagement Manager

Your coordinator on the SmartSuite side:

- Maintains the **shared backlog** and hour tracking
- Estimates effort and proposes what fits into upcoming periods
- Coordinates the SmartSuite expert team (architect, product specialists, integration, enablement)
- Captures meeting notes, decisions, and status updates in the portal

Together, the Program Owner and EM ensure Expert on Demand stays aligned to your roadmap and delivers visible, continuous value.

Expert on demand portal

Every EOD engagement includes a shared SmartSuite workspace or portal where you can see:

- **Hours:** allocated, used, rolled over, and (when approved) borrowed from future months
- **Work log:** completed items, in-progress tasks, and planned work
- **Requests:** new requests and their current status
- **Meeting notes:** decisions and action items from working sessions
- **Documents:** Rules of Engagement and any relevant architecture/roadmap summaries

The portal is the single source of truth for how your Expert on Demand program is being used.



How EOD fits with other SmartSuite services

Expert on Demand complements other SmartSuite service offerings:

- **Onboarding Services** – structured, time-boxed programs to configure your initial Solutions and train early teams
- **Advisory & Implementation Services** – project-based work for roadmap design, architecture, and major implementations via Strategy Roadmap and Solution Launch Packs
- **Training & Enablement Services** – admin and GRC program training, plus SmartSuite Academy and certifications
- **Premium Support** – elevated support tier focused on incidents, SLAs, and a Technical Account Manager

Onboarding and Advisory & Implementation get you live and deliver major milestones. **Expert on Demand keeps you evolving.**

Quick FAQ Snapshot

What if we don't use all our hours?

Up to 50% of unused hours roll into the next month and must be used by the end of that month.

Can we borrow hours from future months?

Yes. Your Program Owner can request to borrow hours from future months. Approved borrowing is reflected in your EOD dashboard and deducted from upcoming allocations.

Is Expert on Demand a project or a subscription?

It's a subscription add-on to your SmartSuite Enterprise plan, designed to be multi-year and part of ARR—not a one-off project or SOW.

Interested in Expert on Demand?

Talk with your SmartSuite account team to:

- Identify the right tier (Essentials, Growth, Premium, or Enterprise)
- Clarify how EOD can support your GRC, IT, PMO, and operations roadmaps
- Align Expert on Demand with your Onboarding, Advisory, Training, and Support plans

Make SmartSuite the platform your teams rely on—with Expert on Demand as your fractional, always-on expert bench.