

SmartSuite Services Overview

From first launch to ongoing evolution and support



Overview

SmartSuite Services are designed to support you at every stage of your journey—from first rollout to long-term success across GRC, IT, PMO, and business operations. We combine:

- **Onboarding Services** – structured programs to get your first workflows live
- **Advisory & Implementation Services** – roadmap, frameworks, domain implementations, integrations
- **Managed Services (Expert on Demand)** – fractional SmartSuite team on a subscription model
- **Training & Enablement Services** – admin and functional training, Academy, customized workshops
- **Premium Support** – elevated support posture with SLAs, a TAM, and executive escalation

Together, these services help you launch, expand, evolve, and protect your SmartSuite investment.

SmartSuite service pillars

Onboarding Services

A structured start for your first workflows and teams

Onboarding Services are 4-week guided programs that help new customers start strong. An Engagement Manager and product specialist work with you to configure the Solutions you've licensed, set up views and dashboards, enable starter automations, define initial roles and access (including SSO/SCIM where supported), and train key users. You finish with **live workflows and a clear path** to deeper GRC, IT, PMO, and operations programs.

Advisory & Implementation Services

From strategy and frameworks to implemented workflows

Advisory & Implementation helps you design SmartSuite around your business. We run **Strategy Roadmap** engagements to align stakeholders and prioritize use cases, and **Framework & Regulatory Alignment** to map frameworks (SOC 2, NIST CSF, CRI Profile, DORA, etc.) into SmartSuite workflows and reporting. Domain-specific **Solution Launch Packs** and **Integration & Migration Services** then turn that plan into live GRC, ITSM, PMO, and operational workflows connected to your ecosystem.

Managed Services – Expert on Demand

A fractional SmartSuite team for Enterprise

Expert on Demand is a managed services add-on for **Enterprise** customers. Instead of a single admin, you get a **fractional SmartSuite team**—EM, architect, product specialists, integration engineer—that acts as an extension of your internal team. Each month you have a set number of hours to use for workflow enhancements, new Solutions, integrations, dashboards, and advisory. It's a predictable, subscription-based way to **evolve SmartSuite continuously** without adding full-time headcount.

Training & Enablement Services

Help your teams understand and own SmartSuite

Training & Enablement builds skills for **admins, builders, and functional teams**. We offer Platform Admin Training (Essentials, Foundations – GRC, Advanced), **Functional Solution Suite Training** for GRC/ITSM/PMO/ops teams, free self-paced learning and certifications via **SmartSuite Academy**, and **customized enterprise training** (virtual or onsite) tailored to your Solutions and use cases. The goal: SmartSuite is not just deployed—it's **understood and owned**.

Premium Support

Elevated support for mission-critical SmartSuite usage

Premium Support is for organizations running **critical GRC, IT, or operational workflows** on SmartSuite. It adds priority SLAs, enhanced coverage, and a **named Technical Account Manager (TAM)** as your main point of contact. Backed by senior support engineers, product/engineering liaisons, executive escalation, and proactive release/roadmap engagement, Premium Support keeps you **online, unblocked, and aligned** with where the platform is going.

Service comparison at a glance

	Primary focus	Engagement type	Example activities	Best for	Who you work with
Onboarding Services	Launch SmartSuite with a structured, best-practice start for your first workflows and teams.	Structured program (typically 4 weeks) with guided working sessions.	Configure initial Solutions; set up views and dashboards; implement starter automations; define roles and access; provide foundational training and resource orientation.	New customers or workspaces needing a guided, best-practice launch for initial workflows and teams.	SmartSuite Engagement Manager, Product/Implementation Specialist, Training & Enablement Lead; your Project/Program Owner, admins/builders, and key users.
Advisory & Implementation Services	Design your SmartSuite roadmap, align to frameworks and regulations, and implement domain workflows through structured Launch Packs and integration/migration work.	Time-boxed projects for roadmap, framework alignment, Launch Packs, and integrations/migrations.	Run Strategy Roadmap; map frameworks into SmartSuite; implement GRC/IT/PMO workflows with Launch Packs; design dashboards; plan and deliver integrations/migrations.	Organizations planning broader SmartSuite programs in GRC, IT, PMO, and operations that require phased rollout and framework alignment.	SmartSuite Engagement Manager, Solution Architect, Product/Implementation Consultants, Data & Integration Engineer, Training & Enablement Lead; your program stakeholders across risk, IT, PMO, and operations.
Managed Services (Expert on Demand)	Continuously evolve and optimize SmartSuite with a fractional SmartSuite team as an add-on for Enterprise customers.	Ongoing program with set service hours per month over a 12-month term.	Enhance workflows; add new Solutions and Interfaces; maintain integrations; refine dashboards; adopt new features; provide ongoing design and roadmap advisory.	Enterprise customers treating SmartSuite as a strategic platform who want ongoing expert capacity without adding full-time headcount.	SmartSuite Engagement Manager, Solution Architect, Product Specialists, Data & Integration Engineer, Change/Enablement Lead; your Program Owner and domain teams.
Training & Enablement Services	Build the skills admins, builders, and GRC/IT/PMO teams need to design, run, and expand SmartSuite.	Ongoing programs plus scoped courses and private workshops (virtual or onsite).	Deliver admin training tracks and functional workshops; run private enterprise sessions;	Companies wanting SmartSuite to be widely adopted and needing durable skills across admins, builders, GRC practitioners, and business teams.	SmartSuite Training & Enablement Lead, instructors/product specialists; your admins/builders, GRC/IT/PMO teams, and leadership where appropriate.
Premium Support	Keep mission-critical workflows running with priority SLAs, a technical advocate, and structured escalation and roadmap alignment.	Ongoing elevated support tier with SLAs, a TAM, and executive-level escalation.	Handle priority tickets and Sev1/Sev2 incidents with SLAs; coordinate complex issues via a TAM; provide release briefings, upgrade guidance, and roadmap feedback channels.	Customers running critical workflows where delays, incidents, or misaligned changes carry significant business or regulatory risk.	SmartSuite support engineers, named Technical Account Manager (TAM), and, when needed, SmartSuite product/services leadership; your technical owners and program owners.

Quick FAQ Snapshot

Do we have to use all services?

No. You can start with **Onboarding** and add **Advisory & Implementation, Expert on Demand, Training & Enablement, or Premium Support** as your needs and programs grow.

How do these services work together?

- **Onboarding** gets your first workflows live.
- **Advisory & Implementation** designs and implements broader programs.
- **Expert on Demand** provides ongoing hands-on capacity.
- **Training & Enablement** builds internal skills to own SmartSuite.
- **Premium Support** strengthens your support posture for mission-critical usage.

Which service should we start with?

Most customers begin with Onboarding for initial rollouts, then add **Advisory & Implementation** for larger programs. As adoption grows, they bring in **Expert on Demand, Training & Enablement**, and **Premium Support** based on their roadmap and risk profile.

Ready to design a SmartSuite Services plan for your organization?

Talk with your SmartSuite account team to:

- Review your **current SmartSuite usage and roadmap**
- Identify which Services—**Onboarding, Advisory & Implementation, Managed Services (Expert on Demand), Training & Enablement, and Premium Support**—are the best fit for your stage
- Build a Services plan that supports your **GRC, IT, PMO, and enterprise operations** over the next 12–24 months

SmartSuite Services turn SmartSuite from a platform you license into a platform you can launch, evolve, and rely on for the long term.