

ONBOARDING

Launching and Scaling Your SmartSuite Solution



Why the Onboarding Phase Matters

The Onboarding phase encompasses all activities required to transition a SmartSuite solution from implementation into day-to-day use. It includes structured rollout, targeted training, guided adoption, validation of operational readiness, support mechanisms, and continuous improvement processes. This phase is where users form their first impressions of the system and begin to internalize how it supports their work.

Neglecting onboarding often results in inconsistent usage, incomplete or inaccurate data entry, misuse of permissions, confusion over roles, and low adoption. These issues can cascade across workflows, reducing trust in dashboards and reporting, creating inefficiencies, and forcing teams to revert to manual processes or spreadsheets. Without a deliberate approach, the time and effort invested in previous phases are undermined.

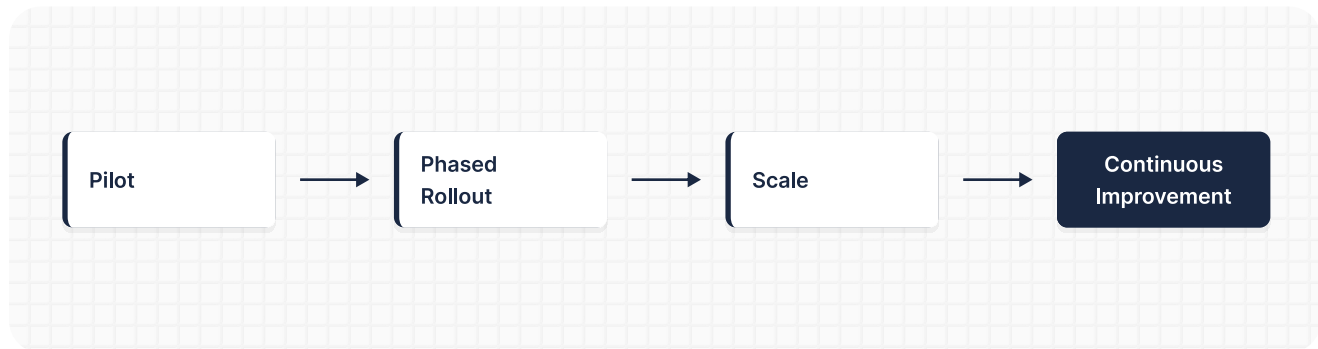
Effective onboarding ensures users understand their responsibilities, interact with the system as intended, and consistently capture data of high quality. It establishes clear support channels, reinforces appropriate use of roles and permissions, and promotes adoption that grows steadily rather than plateauing after launch. By investing in this phase, organizations can turn a configured system into a reliable, trusted operational tool.

In addition, a strong onboarding approach lays the groundwork for continuous improvement. By collecting feedback, capturing enhancement opportunities, and addressing issues promptly, the organization ensures the solution evolves alongside business needs. SmartSuite becomes not just a workflow tool, but a scalable platform that drives operational excellence, trust, and long-term success.



Onboarding Phase Best Practices

Effectively onboarding processes and users in SmartSuite follows a deliberate progression:



Each stage validates assumptions, builds confidence, and prepares the organization for broader adoption.

Principles

1. Keep Deployments Small

Large, monolithic launches overwhelm users and increase risk. Deploy features in manageable increments that can be trained, tested, and supported effectively

2. Pilot Before Scaling

A pilot group provides an early opportunity to validate how the solution works in practice, including workflow behavior, permissions, data handling, user experience, and training materials. By testing with a representative group before broad rollout, teams can identify gaps, reduce rework, and build confidence in the solution ahead of full adoption.

3. Phase the Rollout

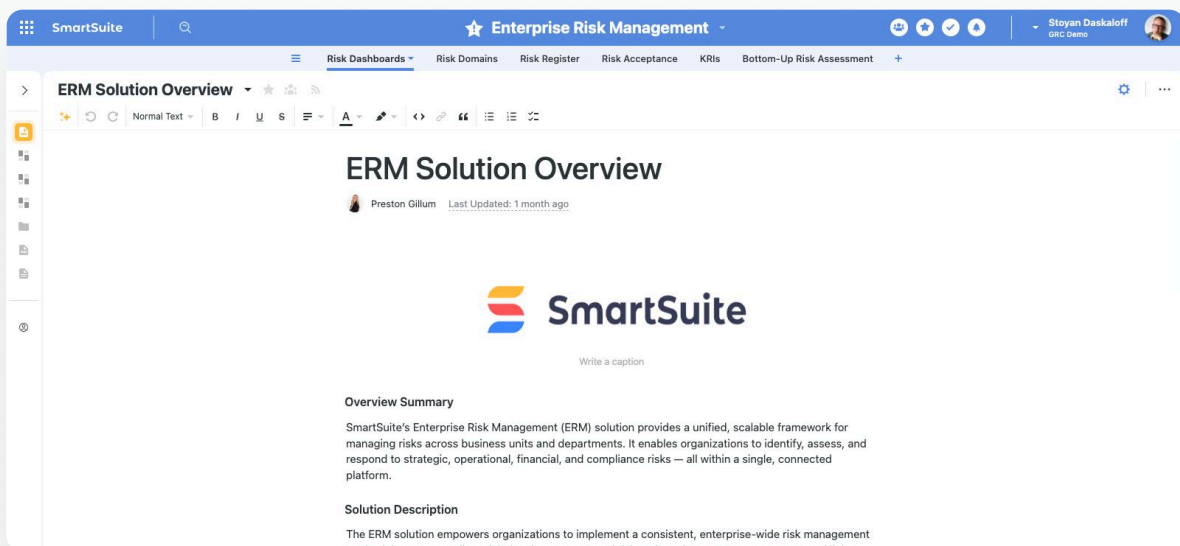
Introducing new teams, features, or processes in phases allows organizations to manage adoption in a controlled and intentional way. A phased rollout supports targeted training, faster identification and resolution of issues, and minimizes operational disruption while the solution scales.

4. Don't Boil the Ocean

Start with the highest-value capabilities. Enhancements can follow once the foundation is stable.

5. Embed Guidance Where Work Happens

Leveraging SmartSuite's native features to deliver guidance directly within the solution helps users learn and work at the same time. Using document views, embedded help text, dashboards, and SmartDocs for process documentation reduces reliance on external materials and ensures instructions, references, and training resources are always accessible in context.



Example: Document View

6. Reinforce Learning Through Multiple Modalities

Effective onboarding combines multiple learning formats to support different user needs and learning styles. Written guides delivered through SmartSuite's document and content views provide embedded quick-start instructions, SOPs, and reference materials directly within the workflow, while short, targeted video walkthroughs visually demonstrate workflows, field usage, and key actions. These resources can be embedded in document views, dashboards, and SmartDocs, helping users learn without leaving the platform.

In addition, live training sessions play a critical role in accelerating adoption. Hands-on, facilitated sessions allow users to ask questions, practice real scenarios, and gain confidence in the solution. Because different users learn in different ways, successful onboarding strategies intentionally combine written guidance, video content, and live training to ensure broad understanding and consistent adoption.

Support Model for Continuous Improvement, Rollout, and Support

A strong support model ensures the solution remains healthy long after launch. SmartSuite's flexibility allows organizations to embed structured change management directly into the platform.

i. Responsible Roles

A cross-functional team drives onboarding and ongoing solution health:

Role	Responsibilities
Product Owner	The Product Owner serves as the strategic leader for the SmartSuite platform. This role ensures that all solutions, across GRC, operations, and business units, work cohesively and align with organizational priorities. Key Responsibilities: • Owns the overall SmartSuite product vision, roadmap, and long-term strategy • Coordinates with the GRC Steering Committee and Business Solution Owners (BSOs) to align priorities • Ensures consistency across solutions, including shared processes, terminology, and data standards



Role	Responsibilities
Product Owner	- Oversees platform governance, including release planning and cross-solution dependencies - Acts as the final decision-maker for platform-level enhancements and architectural changes This role ensures that onboarding activities support not just a single workflow, but the broader SmartSuite ecosystem.
Solution Architect	The Solution Architect designs the structural foundation of the SmartSuite environment. This includes workspace architecture, permission models, and the relationships between solutions. Key Responsibilities: - Designs the workspace hierarchy, including solutions, tables, roles, and security models - Ensures that permissions, teams, and access levels align with business requirements and compliance needs - Establishes scalable architecture for linked records, lookups, rollups, and automations - Reviews proposed enhancements for architectural impact before they enter development - Ensures that TEST and PROD environments remain aligned and migration-ready This role safeguards the integrity, scalability, and maintainability of the solution.
Product Specialist	The Product Specialist is the hands-on configuration expert responsible for implementing changes, supporting users, and maintaining solution health. Key Responsibilities: - Builds and updates fields, views, dashboards, automations, workflows, and logic - Performs break-fix support, troubleshooting, and root-cause analysis - Partners with the Training Lead to ensure training materials reflect current functionality - Executes solution packaging, migration, and operational readiness validation - Supports sprint execution by sizing user stories, configuring features, and performing testing This role is often the “engine room” of SmartSuite onboarding and continuous improvement.

Role	Responsibilities
Training Lead	The Training Lead ensures that users understand how to interact with the solution and adopt intended behaviors. Key Responsibilities: • Creates SOPs, quick-start guides, and role-specific training materials • Develops short, targeted video tutorials for key workflows • Facilitates live onboarding sessions, hands-on workshops, and Q&A forums • Embeds training content directly into SmartSuite using Document Views, dashboards, and help text • Ensures training is updated with every release and aligned to the roadmap This role bridges the gap between technical configuration and user experience.
Business Solution Owner (BSO)	The BSO is the business-side owner of the workflow. They ensure the solution reflects real operational needs and remains aligned with business processes. Key Responsibilities: • Owns the business process and ensures SmartSuite reflects current and future requirements • Reviews and approves change requests, enhancements, and new features • Prioritizes user stories in collaboration with the Product Owner • Identifies and coordinates user acceptance testers (UAT) • Participates in cross-functional BSO meetings to align on shared processes, terminology, and data ownership The BSO ensures that onboarding and enhancements deliver measurable business value.
Users	Users interact with the solution daily and provide essential feedback for continuous improvement. Key Responsibilities: • Perform workflow tasks according to defined processes • Participate in pilot groups and UAT for new features • Provide feedback, report issues, and suggest enhancements • Follow SOPs, training materials, and guidance embedded in the solution Users are the ultimate measure of onboarding success.

Role	Responsibilities
GRC Steering Committee	The Steering Committee provides executive oversight and ensures alignment between SmartSuite solutions and organizational strategy. Key Responsibilities: • Approves major roadmap items, including cross-functional enhancements • Ensures alignment across departments on data ownership, terminology, and shared processes • Reviews adoption metrics, performance indicators, and operational maturity • Provides financial support and prioritization for major initiatives • Resolves escalations and cross-team conflicts This group ensures that onboarding and continuous improvement remain strategically aligned.

ii. SmartSuite Support Solution to Embed a Consistent Methodology

SmartSuite's Product Management, Product Roadmap, and Software Test Plans templates create a structured, repeatable support model:

- Intake & triage: Capture enhancement requests and convert them into user stories
- Prioritization: Assign story points and align with BSOs
- Sprint planning: Organize work into sprints and releases
- Traceability: Link user stories → features → epics → test cases → releases
- Testing: Validate changes using Test Plans and Test Runs
- Documentation: Maintain SOPs, release notes, and training materials in Document Views

This creates transparency, consistency, and auditability across the entire change lifecycle.

ii. SmartSuite Support Solution to Embed a Consistent Methodology

Agile sprints accelerate onboarding and continuous improvement:

- Short cycles reduce risk and deliver value quickly
- Early prototypes increase user buy-in
- Frequent feedback loops reduce rework
- Incremental deployment simplifies training and support

SmartSuite's native capabilities, including dependencies, timelines, dashboards, and automations, support agile execution without external tools.

Strategic Planning

i. Steering Committee

The steering committee ensures that solution enhancements remain aligned with organizational priorities by approving major roadmap items, resolving cross-functional conflicts, ensuring consistent data ownership and terminology, and reviewing adoption and performance metrics to guide ongoing decision-making.

ii. Roadmap Planning

A living roadmap should align epics and features to business objectives, incorporate dependencies and timelines, reflect sprint commitments and release cycles, and provide shared visibility to stakeholders through accessible views.

iii. Success Measurement

Success should be measured through adoption metrics such as logins, record creation, and workflow completion, as well as data quality indicators including completeness, accuracy, and validation errors.

Process performance can be tracked through cycle time and SLA adherence, while user feedback, via surveys, support requests, and enhancement suggestions, provides insight into experience. Operational maturity is assessed by alignment with the onboarding checklist.

Release Checklists

A consistent release process ensures quality, reduces risk, and builds user trust.

i. Training Creation and Communication

Training should be created or updated for every release:

- SOPs: Step-by-step instructions embedded in Document Views
- Videos: Short walkthroughs demonstrating key workflows
- Quick-start guides: Role-specific summaries of what changed

ii. Release Notes

Release notes should summarize changes, provide links to updated training, highlight impacted tables, fields, and automations, and clarify deployment timing and expectations.

iii. Migration Checklists

For data imports or solution packaging:

- Validate linked records, formulas, and rollups
- Confirm automations reference the correct tables
- Reconcile migrated data with source systems
- Verify team membership and permissions

iv. Operational Validation

After deployment:

- Validate tables, fields, and automations
- Test AI Assist prompts and webhooks
- Confirm dashboards and views function as expected
- Ensure users can access the solution with correct permissions



Common Onboarding Pitfalls

Even well-designed SmartSuite solutions can struggle during onboarding if teams overlook common implementation challenges. These pitfalls often stem from assumptions about user behavior, insufficient validation, or a lack of structured support after go-live. Recognizing these risks early, and building mitigation strategies into your onboarding plan, ensures smoother adoption, higher data quality, and long-term operational maturity.

The following pitfalls represent the most frequent issues organizations encounter during SmartSuite onboarding, along with practical guidance on how to avoid them using SmartSuite's native capabilities.

Assuming Users Will Self-Adopt

Even intuitive SmartSuite solutions require structured guidance. Without training, quick-start materials, and clear ownership, users may revert to old processes or adopt inconsistent behaviors. This leads to poor data quality, low engagement, and confusion about how the workflow should operate.

How to Avoid It:

Provide role-specific training with Document Views, embedded SOPs, and short videos. Use dashboards to guide users with contextual instructions and "What to Do Next" panels, deliver quick-start guides inside SmartSuite, and assign a Training Lead to maintain materials and reinforce adoption.

Skipping Pilot or Phased Rollouts

Launching to all users at once increases risk and limits opportunities to validate assumptions. Without a pilot, issues with permissions, workflow logic, or data behavior may go unnoticed until they impact the entire organization.

How to Avoid It:

- Start with a small pilot group to validate workflows, permissions, and user experience.
- Use phased rollouts to introduce additional teams or features gradually.
- Capture pilot feedback using SmartSuite forms or intake workflows.
- Adjust the solution before scaling to reduce rework and build user confidence.

Unclear Post-Launch Ownership and Support Model

Without defined ownership, issues linger, enhancements stall, and user confidence erodes. Teams need clarity on who manages the solution, who approves changes, and how support requests are handled.

How to Avoid It:

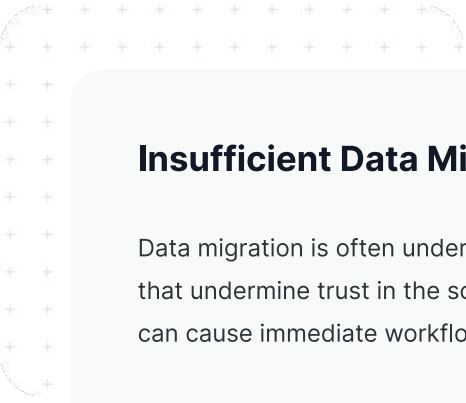
Set up a clear support model with defined roles, including Product Owner, BSO, Product Specialist, and Training Lead. Use SmartSuite's Product Management template for intake, triage, user stories, and releases. Publish a "How to Get Help" guide within the solution, and hold recurring support sessions to address questions and maintain momentum.

Lack of Success Metrics and Adoption Monitoring

Teams often declare success at go-live without measuring whether the solution is being used effectively. Without metrics, it's difficult to identify adoption gaps, training needs, or workflow bottlenecks.

How to Avoid It:

- Track adoption using SmartSuite dashboards: logins, record creation, workflow completion, SLA adherence.
- Monitor data quality indicators such as completeness, accuracy, and validation errors.
- Review metrics with the Steering Committee and BSOs to guide roadmap decisions.
- Use SmartSuite automations to flag missing or inconsistent data.



Insufficient Data Migration Validation

Data migration is often underestimated. Importing data without thorough validation can introduce errors that undermine trust in the solution. Incorrect linked records, missing values, or formula misalignment can cause immediate workflow failures.

How to Avoid It:

Test imports in the TEST environment before PROD migration. Validate linked records, formulas, rollups, and automations, reconcile data with source systems using views and filters, and involve users to confirm accuracy and completeness.

No Feedback Loop for Continuous Improvement

Without a structured mechanism for capturing user feedback, the solution stagnates. Users may identify issues or opportunities, but without a formal process, these insights are lost.

How to Avoid It:

- *Implement a change request intake form using SmartSuite's Product Management template.*
- *Convert feedback into user stories and assign story points for prioritization.*
- *Hold monthly BSO or cross-functional review sessions to evaluate enhancement requests.*



Treating Go-Live as the End of the Implementation

The most important work often happens after launch. Organizations that treat go-live as the finish line fail to mature the solution, resulting in declining adoption and missed opportunities for optimization.

How to Avoid It:

Establish a continuous improvement cycle with regular sprints and releases. Keep a living roadmap aligned to business priorities and SmartSuite updates. Conduct post-implementation reviews to assess adoption, workflow performance, and user feedback. Leverage SmartSuite's dependency and timeline features to plan enhancements and track progress.

High Level Onboarding Checklist

The checklist below provides an operational maturity framework, helping teams assess readiness and plan post-launch improvements.

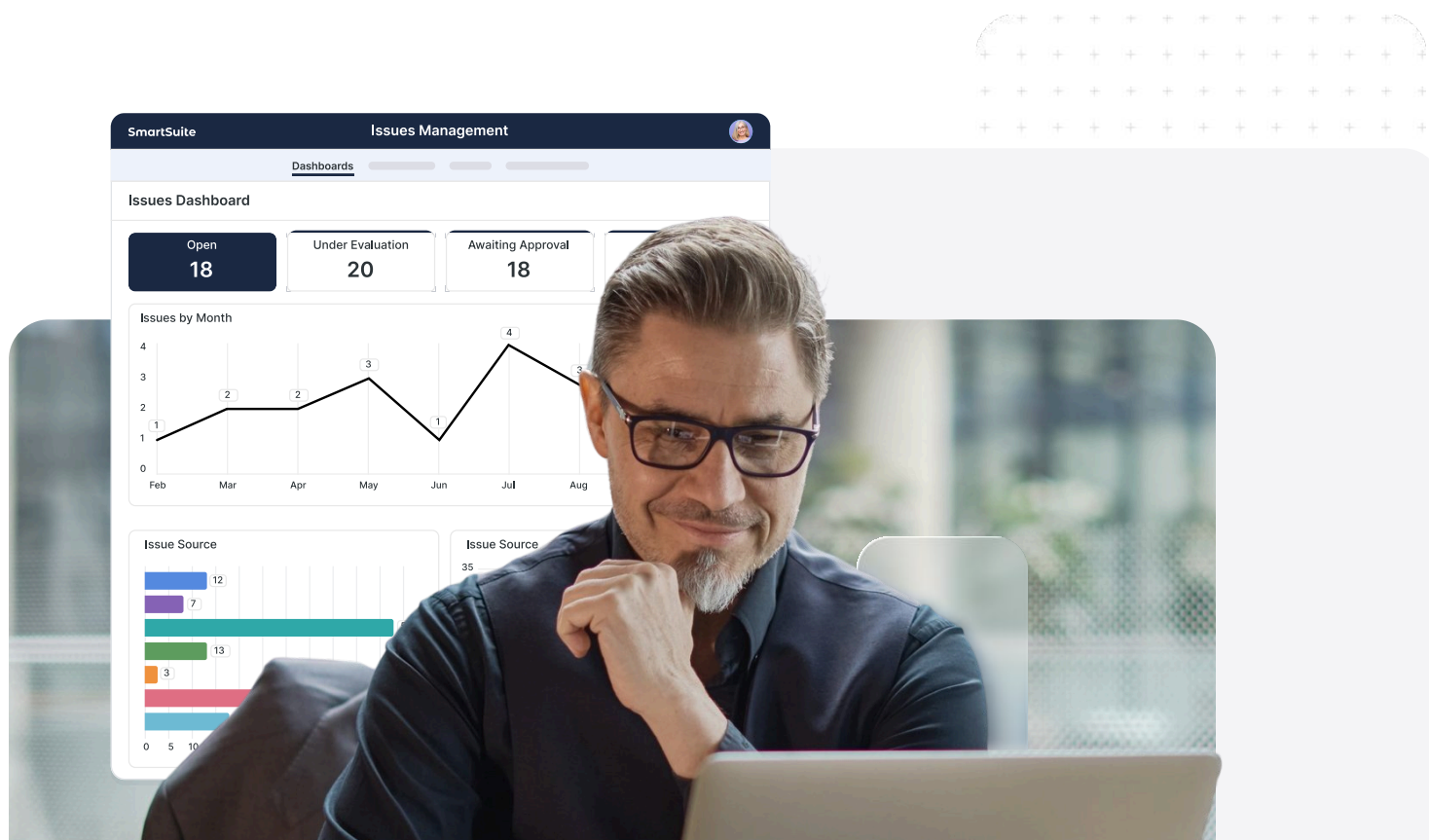
Checklist Item	Description	Benefits
Preparation	Confirm user stories are signed off; draft release notes and communications; create solution package if needed.	Reduces deployment risk and ensures stakeholder alignment.
Solution Packaging and Install	Package from TEST; preserve relationships; audit for broken links; install in PROD; verify teams and content.	Ensures clean migration and consistent configuration
Operational Readiness Validation	Validate tables, fields, automations, AI prompts, and webhooks; confirm permissions and team membership; perform data imports.	Ensures the solution functions correctly before onboarding users.
Communication	Send release notes with links to training and guides.	Improves awareness and accelerates adoption.



Onboarding Use Case Example: Issue & Action Tracking

After launch, the Issue & Action Tracking workflow was rolled out in phases, supported by quick-start guides and clear ownership dashboards, driving consistent adoption across teams.

Onboarding Activity	Benefits
Pilot with a small compliance team	Validated workflow logic and permissions before scaling.
Embedded Document View quick-start guides	Reduced training time and increased user confidence.
Role-based dashboards	Clarified ownership and improved follow-through on actions.
Monthly support sessions	Captured enhancements and strengthened continuous improvement.



Executive Summary

The Onboarding phase is where a SmartSuite solution moves from design and configuration into actual use. Without a structured rollout, targeted training, and ongoing support, even well-planned and expertly modeled solutions can fail to deliver value. Skipping or under-investing in onboarding leads to low adoption, inconsistent use, increased errors, and reliance on spreadsheets or workarounds, undermining the effort invested in prior implementation phases.

A deliberate onboarding approach ensures users understand their responsibilities, know how to navigate workflows, and can confidently execute tasks within the system. By providing structured training, quick reference guides, and guided adoption experiences, teams can accelerate uptake, reduce mistakes, and foster trust in the solution. Proper onboarding also establishes mechanisms for ongoing feedback, continuous learning, and incremental improvement, keeping the system aligned with evolving business needs.



This white paper provides a practical, implementation-oriented guide for onboarding SmartSuite workflows. It walks through strategies for phased rollout, training approaches (including video, guided sessions, and document-based resources), validation of operational readiness, and mechanisms to support adoption, sustainment, and continuous improvement. Real-world examples and checklists demonstrate how structured onboarding ensures users are prepared and engaged from day one.

It is intended for services consultants, implementation partners, solution administrators, and business leaders responsible for user adoption and operational readiness. By following these approaches, organizations can maximize the return on their SmartSuite investment, reduce operational risk, and establish a foundation for scalable, sustainable workflows that continue to deliver value over time.

Conclusion: Launching for Adoption and Impact

Successful onboarding is the bridge between a well-designed SmartSuite solution and the day-to-day work it is meant to enable. By investing in structured training, guided rollout, and clear support mechanisms, organizations ensure that users understand their responsibilities, data is captured accurately, and workflows function as intended. Proper onboarding transforms a configured system into a trusted operational platform, setting the stage for consistent adoption and reliable outcomes.

In addition, onboarding is not a one-time effort, it creates the foundation for continuous improvement. Collecting feedback, prioritizing enhancements, and proactively supporting users allow the solution to evolve alongside business needs. When executed thoughtfully, onboarding ensures that SmartSuite delivers long-term value, fosters user confidence, and becomes an integral part of organizational operations.

