

A Customer Experience Guide to Implementing the Connect Platform

Implementation Methodology & Approach

Here at Montrium, we are focused on making sure our customers are successful with our products and enjoy the best possible customer experience. That relationship starts during the Setup & Onboarding Phase of Implementation. We go over and above what the industry expects to provide additional resources and acceleration tools to get your team up and running as fast as possible. Below we've highlighted a few key elements of the process that will enable your organization to go live in a shorter timeframe.

Customer Experience is Our Core Focus

We believe customer experience is a top-down philosophy that is not just a position or department, but rather a company-wide approach to building strong, lasting partnerships. Your success is our priority. That means we strive to provide and maintain continued value, time and time again. Our global teams not only have the business aptitude and regulatory knowledge to efficiently support our customers, but the hands-on experience and dedication to become a real extension of your team.

A Tried & Tested Project Methodology

Montrium's Customer Experience teams leverage a modern approach to project management and software implementation, focusing heavily on strategic planning processes to ensure success. This approach has enabled us to provide a project experience that not only optimizes the onboarding and implementation process but increases the quality of the overall solution delivery. Our implementation approach sets itself apart from more traditional approaches to system implementation by:

1. Rigorously researching and planning each customers' intended use case
2. Providing thorough training programs and exercise-based learning
3. Promoting risk-based approach to validation to reduce your teams' burden
4. Creating an environment where you work with the same team day after day, giving us the opportunity to intimately understand your business, your people and your goals.



Also, throughout the implementation process, a dedicated Product Specialist provides hands-on guidance and advice to help customers prepare and advance through the validation phase. At no additional charge, Montrium provides a tried and tested set of validation test script templates that, if needed, can be used to accelerate the validation process. Montrium also offers a range of other templates (traceability matrix, user requirements specification, validation master plan, and validation summary report) included as part of the setup and onboarding fees.

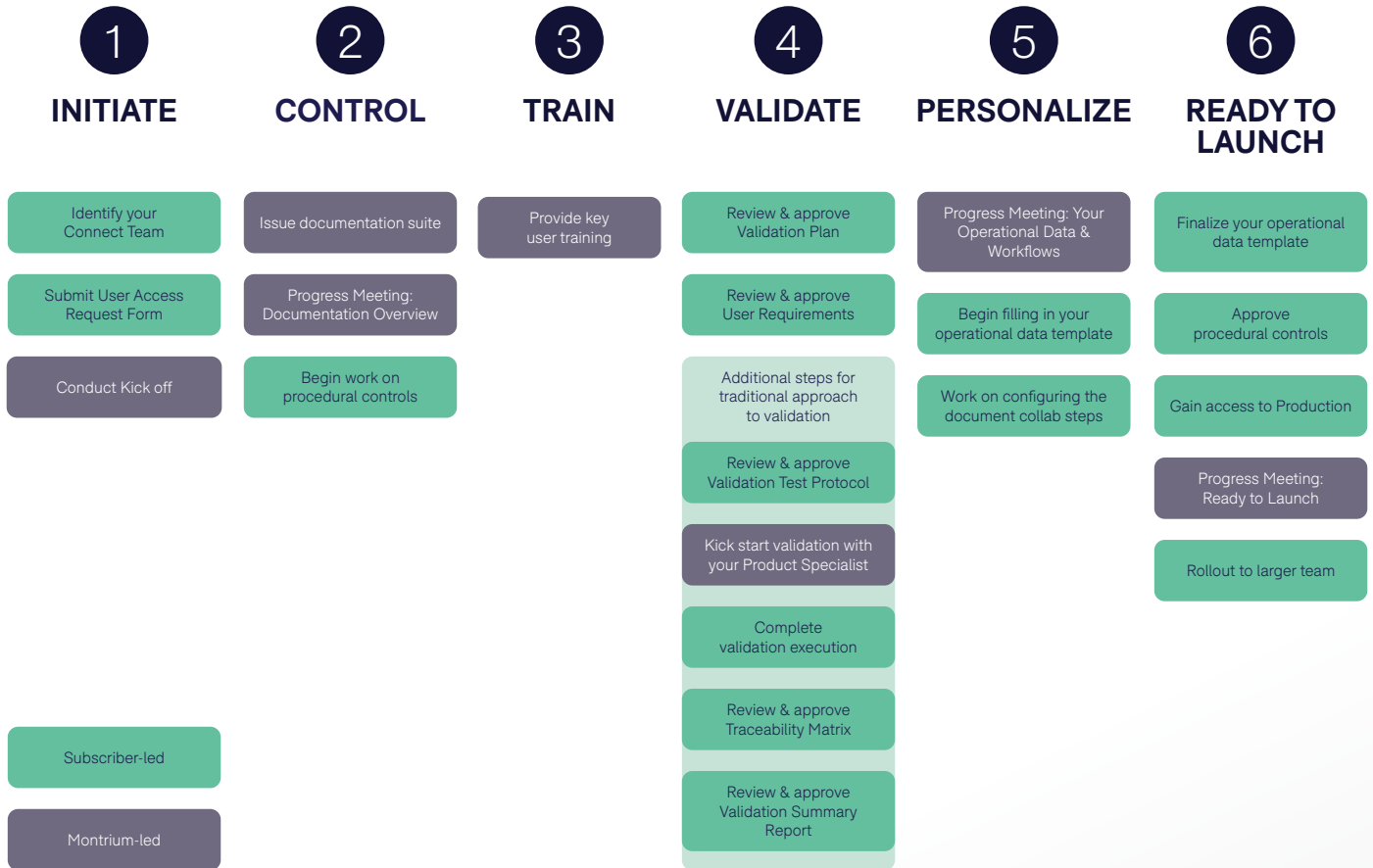
Connect Project Methodology Overview

Montrium's Customer Experience Team follows a tried and tested project methodology to standardize and optimize the delivery of our product. The implementation process typically includes some or all the below project phases:

1. Initiation
2. Controls
3. Training
4. Validation
5. Personalization
6. Launch

The following illustrates estimated timelines based on Montrium's suggested approach and designated resources from the customer team being made available during the implementation process.

Your Onboarding Roadmap



Phase 1. Initiation

Clearly defining required outcomes and goals are catalysts for delivering a successful implementation. The initiation phase consists of three important steps:

1.1 The Strategy Session

As soon as our customers finalize their agreements, we schedule a Strategy Session to efficiently communicate project goals, timelines and specific use cases that the implementation team needs to be aware of. We'll talk a little bit about your objectives in terms of use and implementation timeline and provide a brief overview of the onboarding process. An important deliverable following the strategy

session is the list of the key project team members on your end that will help move the implementation project along. This session typically includes the key stakeholders from your Connect team and is designed to set expectations and provide key information to your dedicated Product Specialist.

Montrium employs a Train-the-Trainer approach meaning that your group of key users will be trained on the ins and outs of Connect. This group then becomes your Connect SMEs (Subject Matter Experts) and will be responsible for putting together a training program for your end users with the support of your Product Specialist. Training to end-users directly by Montrium is an additional service that can be provided upon request.

1.2 Onboarding Kick-Off

Now that you're a little more familiar with the process and who should be involved on your end, we'll have this meeting with the project team to present the process in detail. We'll also present to you the custom onboarding timeline that we've built based on your target date for implementation completion.

1.3 Documentation Suite

As part of your subscription, you have access to a suite of documentation (SOP templates, validation deliverables, the Compliance Statement, Release Notes, Minimum Workstation Requirements etc) that will help expedite the implementation of Connect and that are important for subsequent phases.

Phase 2. Controls

The Controls phase is the step of ensuring that the proper procedural controls are in place to support Connect. It is recommended to begin this phase as early on as possible since SOP implementation takes time. At a minimum, it's important that your SOPs are at least approved for training, or ideally effective before launching the system.

If you don't have certain SOPs in place, Montrium provides a detailed set of SOP templates to govern the use of your Connect application. Should there be additional SOPs you need, we are able to facilitate this development internally or through a partner for an additional cost.

Phase 3. System Training

Training is one of the most crucial milestones in any implementation project. Montrium's Product Implementation Teams see training as a partnership between the customer and our team. Training is comprehensive and is often customized to our customer's specific use case, removing the need for any redundant training activity.

We take a multi-faceted approach to training your teams, combining classroom-based training with in-system exercises creating the perfect balance between practical hands-on learning and theoretical exploration. As always, customer teams that dive headfirst into training with enthusiasm and work hard to advocate for the platform and the training material often have a shorter learning curve and accelerate user adoption.

Montrium provides a range of training activities to ensure the different types of users receive the material and support they need to carry out their tasks. Your Product Specialist will schedule a series of training sessions to ensure your core team are able to train others on how to use Connect. This training will be scheduled for those users identified as Super Users and Application Managers. Training can take place remotely or on-site, per your preference. If you prefer on-site training, speak to your Montrium representative about what this entails.

The length of training varies per implementation, depending on the number of modules included in your subscription and your specific use case. We recommend your Super Users and Application Managers to be trained on all aspects of Connect so that they are well-informed to then adapt training as needed for the organization, however, we will work with you to customize training to meet your needs.

As part of the training process, Montrium also provides comprehensive training for Business Process Owners. For each module that our customers onboard, the Product Implementation Team provides up to 16 hours of training over several sessions. The following is an example of the training program and hours that are included as part of our training program.



Session Description	Duration (Hours)
Introduction to Connect	2
Module-Specific Training	3-5
Super User Training	2
Application Manager Training	1
Q & A Sessions	2

Phase 4: Validation & Compliance

Since its inception, Montrium has put a heavy focus on providing expert guidance and advice surrounding the regulatory requirements that our customers are required to adhere to. It's through our experience implementing and developing a range of regulated applications, and through our large in-house validation team that we have developed a trusted and proven methodology for validation. Throughout the qualification and validation of the Connect platform, Montrium leverages the GAMP-V model to create the necessary validation deliverables and to conduct validation activity. We validate both the core and native Connect functionality to ensure and document that the system is meeting the requirements of your intended use.

Montrium is responsible for a large portion of the computer system validation of the Connect platform and thus delivers a range of documentation, qualification records and other information related to every Connect release. Should our customers wish to review this documentation, it is available for reference upon request and at no additional cost.

The length and complexity of validation are largely dependent on the selected approach to validation. For more information on our recommended Validation approach, please contact Montrium to request our Validation Information Sheet.

Phase 5. Personalization

As part of the implementation process, you will be provided with a template that will allow you to personalize your Production environment with your organization-specific data. For example, this may include a list of studies and products or a list of departments and employees, etc. We'll work with you to complete this template, and once finalized, we'll take care of the configuration itself. Once your production environment has been configured, we're ready to begin planning out the launch sequence and rollout activities.

Phase 6. Ready to Launch & System Rollout

At this point, your project team will confirm that you have everything you need to launch Connect internally. We will continue the user adoption program and be able to assist with any questions moving forward.

Once our customers go live, the support doesn't end. We understand that maintaining our Connect applications is a joint responsibility between our customers and Montrium. In addition to providing complimentary access to our technical support team, Montrium also encourages our customers to identify business and system administrators to provide internal support to end-users post-implementation. Together with your Product Specialist, the rollout period will consist of:

- Initiating training on relevant procedural controls for personnel and ensure procedural controls become effective.
- Planning your end user training. The key users trained by Montrium should plan for a training program for end users of the system. Your Product Specialist can help define and tailor this with you.
- Thinking about user profiles and permissions. Your Product Specialist can provide guidance on what permissions best map to your user's roles.
- Determining whether legacy documents or data are required for go-live. Montrium offers migration services to bring in these documents and data for you.
- Once end users are trained, the procedural controls governing the system are effective and you've evaluated the need to bring in legacy documents/data, you are live!

Additional Resources and Ongoing Support

- *We also understand that it's not always convenient for our customers to contact a support agent for every query or question. Sometimes, it's just nicer to go at your own pace. That's why we provide an on-demand Help Center for end-users and administrators to obtain key information and training material on our Connect applications. This Help Center can be found within every application our customers subscribe to, so you have a centralized, searchable knowledge base with helpful product articles and video tutorials covering a broad range of topics and frequently asked questions.*

If you can't find what you need, you can submit any questions or feedback about product functionality, features, troubleshooting, etc., with a ticket via the Help Center. With each ticket, you can assign its business impact, describe what the issue is, and attach any supporting files and more. This system has reduced the average response time, and average resolve time, so you can get the right answer, faster.

The Connect Help Center is also where you'll find updates on system changes. For convenience, you will have direct access to Release Notes as well as details of recent and upcoming deployments to your Training and Production environments.

Content Migration Support

Montrium's experienced migration team has worked on over 100 data migrations for our customers on a range of projects. Our migration methodology is rigorous and comprehensive to ensure the smooth migration and movements of documents and data into our Connect applications. The following details the steps our migration team takes on every client project:

1. Migration Analysis
2. Migration Planning & Preparation
3. Migration Execution
4. Migration Verification

The migration of documents and data is an optional service that Montrium can provide at an additional cost. For more information on our migration approach, please contact Montrium to request our Migration Information Sheet.



Customer Experience: going above and beyond

Beyond deployment and onboarding, our Customer Experience team works to ensure your Connect product(s) works optimally and continues to serve your needs. Whether during implementation or after you are live with the system, it is important to us that we give you the right resources, help bridge any gaps in your business process, and that we incorporate your feedback along the way to shape the future of our products.

As part of our commitment to your success, we've put in place the following initiatives to drive your business growth and operational workflow:

- A truly tailored onboarding experience with a dedicated Product Specialist supporting you every step of the way to fully adopt the Connect application that you're subscribing to
- Your Product Specialist will continue to meet with you for regular check-ups at the frequency you prefer, and help you roll out the system to your greater team
- Quarterly business reviews every 3 months with your Product Specialist and Account Executive to ensure your objectives are being achieved and expectations exceeded
- Align your organization and Montrium in product vision and process
- Provide a space for product feedback and for you to be involved in product roadmap discussions
- Quarterly customer-only webinars designed to provide transparency and consistent messaging with our users as we continue to build the future of our platform
- Additional service: Refresher training and ongoing communications around business expectations



Our mission is to help you grow, maximize long-term product value, and make your Connect experience seamless with comprehensive product implementation and ongoing support. If you have any further questions or would like more information, please get in touch with us.

About Montrium

Founded in 2005, Montrium is one of the leading providers of cloud-based content and collaboration software to the life sciences industry. Having served over 200 clients in over 20 countries, we are committed to delivering unparalleled subscriber experience, innovation and product quality to life science organizations as a true technology partner. Montrium is headquartered in Montreal, Canada, with a European office in Brussels, Belgium.

About the Connect platform

The Connect platform is a collaborative platform for managing regulated content, processes and compliance in the life sciences. Connect includes a suite of applications; eTMF Connect, RegDocs Connect, and Quality Connect, each designed to empower life sciences organizations in their management of programs and compliance within research and development.

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