

PROFESSIONAL SERVICES

The implementation process

So, you've just signed your Helm CONNECT contract. Now what happens? You can't just snap your fingers and have a fully configured system – first you have to go through implementation.

The real value in the implementation process comes from our implementation specialists; they are your Helm CONNECT experts. They take the time to understand you and your business so they can recommend personalized best practices that will allow you to optimize your systems. Helping you get up to speed and find value as soon as possible is their goal, so they are by your side every step of the way personalizing support to your needs and helping you set success criteria to track the value you're getting out of the project.

When you go through a Helm CONNECT implementation, you're getting:

- > Guidance from a Helm CONNECT expert
- > Hands-on training using Helm official resources
- > Personalized care and support
- > Suggested best practices to ensure your implementation is successful

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“The Professional Services team was able to quickly understand our specific needs and provide instant solutions. When we presented areas of concern, they were able to help us work around the problems to accommodate our specific needs. Overall, they were very informative and helpful.”

– Edison Chouest

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The Sample Timeline

	Kick-off & Data Collection	Training	Configuration	Go-Live & Hypercare	Total Time
Small Operator 1-7 Assets	3-4 weeks	2-6 weeks	2-4 weeks	2-4 weeks	9-18 weeks
Medium Operator 8-19 Assets	3-4 weeks	4-8 weeks	4-8 weeks	2-4 weeks	13-24 weeks
Large Operator 20+ Assets	4-8 weeks	6-12 weeks	6-12 weeks	4-12 weeks	20-44 weeks

The Process

Each implementation will follow this process, but the level of support received during each phase will vary depending on your specific needs.

Phase 1: Kick-off & Data Collection

In this first phase of the implementation process, your Helm Implementation Specialist will train your team on how to gather the data you would like configured in the system using the templated data sheets we provide. Once you know what data to gather, your implementation specialist will assist your team with the collection process. Data collection is critical to the success of an implementation because the data configured in the system forms the backbone of your business in Helm CONNECT. Once your implementation specialist has signed off on data collection you can move on to training.

PHASE 2: TRAINING

This is the phase where you become a Helm CONNECT expert. After you have collected the necessary data, your Helm Implementation Specialist will kick off your remote training sessions. We utilize a train-the-trainer approach to ensure your team has both the expertise and autonomy for ongoing success. Your implementation specialist will schedule regular sessions at a frequency of your choosing. Each session will cover a review of the previous session, a new set of Helm CONNECT functionality, and set up for takeaway configuration work. Using this approach, we're able to ensure that you retain information, and continue moving forward at a good pace. At the end of the training, we provide a detailed list of remaining configuration tasks in order to create a clear path to go-live.

Once the remote training is completed, it is the responsibility of your super users to lead end-user training for your crew. Using this model empowers your company to manage its own data and gives you full control on how to execute the roll out.

PHASE 3: CONFIGURATION

Once training is done, it is time to complete the configuration of your system. You'll use the detailed list provided at the end of training to track everything that needs to be done ahead of go-live. While completing this list is your responsibility, you will have the support of your Helm Implementation Specialist along the way. There's a lot of truth to the saying "practice makes perfect;" this approach solidifies your fluency with Helm CONNECT and ensures you retain all of the valuable skills you've learned.

PHASE 4: GO-LIVE AND HYPERCARE

In the final phase of implementation, you will install Helm CONNECT on board your assets and complete end-user training on the system. Having a strong end-user training plan is critical to proper system use on the ground level, and leads to higher adoption, better data for reporting, and a greater chance of overall success.

Ongoing Support

After your company goes live and completes the hyper care period, your time with your Helm CONNECT Implementation Specialist comes to an end. At this point, if you need any help you can reach out to your assigned Account Manager or our dedicated Support team who will work together to give you feedback, introduce new functionality, and help resolve issues. In addition to these resources, you can also access Helm U for refreshers and updates on how to use new features.

Your Implementation Checklist

Phase	Preparation Checklist
Setup & Data Collection	<ul style="list-style-type: none"> ✓ Do you have support from senior management? ✓ Do you have the right project team established? ✓ Have you created urgency around this change and communicated that it is a priority to the team? ✓ Do you have the right technical specifications to run Helm CONNECT? ✓ Do you have computers on board if you're doing on-board asset installations?
Training	<ul style="list-style-type: none"> ✓ Do I have my super users? ✓ Do my super users each have a laptop for training?
Configuration	<ul style="list-style-type: none"> ✓ Is everything needed configured in the system? ✓ Have you tested the final workflows?
Go-Live & Hypercare	<ul style="list-style-type: none"> ✓ Do you have a plan for training your crew after the onsite? ✓ Has it been communicated to the team that this is a priority?
Ongoing Support	<ul style="list-style-type: none"> ✓ Do you have a plan for running refresher training? ✓ Do you have a process for training new users?