

# The Implementation Process

So you've just signed your Helm CONNECT contract. What happens next? Well, now it's time for our amazing implementation process to take place!

The real value in the implementation process comes from our Implementation Specialists; they are your Helm CONNECT experts. By working closely with our customers, we've developed a proven process which has helped us implement over 200 companies and 4000 assets in just three years! We take the time to understand you and your business so we can recommend personalized best practices that will let you optimize your systems. Our goal is to get you up to speed and finding value as soon as possible, so we'll be 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

## Sample Timeline

While the complexity of the project won't affect the process itself, the number of hours required to complete your implementation will vary depending on the number of assets you have and the products you choose.

| Operator Size                | Setup & Data Collection | Training   | Configuration | Go-Live & Hypercare | Total Time  |
|------------------------------|-------------------------|------------|---------------|---------------------|-------------|
| <b>Small</b><br>1-7 Assets   | 3-4 weeks               | 2-6 weeks  | 2-4 weeks     | 2-4 weeks           | 9-18 weeks  |
| <b>Medium</b><br>8-19 Assets | 3-4 weeks               | 4-8 weeks  | 4-8 weeks     | 2-4 weeks           | 13-24 weeks |
| <b>Large</b><br>20+ Assets   | 4-8 weeks               | 6-12 weeks | 6-12 weeks    | 4-12 weeks          | 20-44 weeks |

## Phase 1

### SETUP & 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. You can move on to the next phase once your Implementation Specialist has signed off on data collection.

## Phase 2

### TRAINING

This is the phase where you become a Helm CONNECT expert! After you've collected the necessary data, your Helm Implementation Specialist will either come on site or call you remotely to start training (depending on your selected package). They'll embed themselves in your operations to train your selected "superusers" (your admin users and Helm CONNECT experts) on how to fully utilize and configure the system. We'll complete as much configuration as possible, and at the end of the training, we'll provide a detailed list of remaining configuration tasks in order to create a clear path to go-live.

Once the onsite visit or remote training is completed, it is the responsibility of your superusers 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 completed, it's 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'll have the support of your Helm Implementation Specialist along the way. This phase allows for the application of everything that's covered in the training phase and ensures that your team retains their newfound knowledge. After all, practice makes perfect!

## Phase 4

### GO-LIVE & HYPERCARE

In the final phase, you'll 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 rates, better data for reporting, and a greater chance of overall success.

---

These four steps, along with a strong level of commitment and engagement during the implementation process are vital for success. Doing so will result in:

- Higher adoption rates
- Leveraging full functionality
- Getting better data

## Ongoing Support

After you go live and complete your Hypercare period, your time with your Helm 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 any issues. In addition, you can also access our online resources for refreshers and updates on how to use new features, all so you continue to get the most from Helm CONNECT.

## Your Implementation Checklist

|                         | CHECKLIST  |
|-------------------------|--|
| Setup & Data Collection | <ul style="list-style-type: none"> <li>✓ Do you have support from senior management?</li> <li>✓ Do you have the right project team established?</li> <li>✓ Have you created urgency around this change and communicated that it is a priority to the team?</li> <li>✓ Do you have the right technical specifications to run Helm CONNECT?</li> <li>✓ Do you have computers on board if you're doing on-board asset installations?</li> <li>✓ Have you completed the provided data collection spreadsheets? Is your data ready to be input into checklists, forms, and certificates?</li> </ul> |
| Training                | <ul style="list-style-type: none"> <li>✓ Have you identified dates and times when your superusers are available for training?</li> <li>✓ Do you have an appropriate training room with a projector or TV booked for the onsite?</li> </ul>   |
| Configuration           | <ul style="list-style-type: none"> <li>✓ Do the appropriate people on your team have time allocated for the configuration of your Helm CONNECT environment?</li> <li>✓ Have you developed a plan that identifies which team members are responsible for configuring data in your Helm CONNECT environment?</li> </ul>  |
| Go-Live & Hypercare     | <ul style="list-style-type: none"> <li>✓ Do you have a plan for training your crew after the onsite?</li> <li>✓ Has it been communicated to your team that this is a priority?</li> <li>✓ Have you provided your crew with an easily accessible internal support network they can use if they have questions?</li> </ul>   |
| Ongoing Support         | <ul style="list-style-type: none"> <li>✓ Do you have a plan for running refresher training?</li> <li>✓ Do you have a process for training new users?</li> <li>✓ Do you have a process for making changes to the configuration?</li> </ul>  |