

ClearCo.

The ClearCompany Implementation Experience

GUIDE



The Customer Experience

At ClearCompany, we're dedicated to helping you achieve your mission by bringing together people, platforms, and processes to maximize your employees' talent. The first step toward achieving your mission is implementing your new ClearCompany software.

We know getting started with new business software can feel like a big step. That's why ClearCompany's team of implementation experts is there to guide you every step of the way, and our online help resources are always available when you need them.

Our goal is to give you the tools, knowledge, and support you need to hit the ground running with your new software. With ClearCompany, you're gaining more than just modern, powerful software — we're your trusted partner, committed to helping your organization thrive.

Transformative Talent Tools, Fast Results

See how Rugby ABP started hiring with ClearCompany in just weeks.

[Read the case study](#)

The ClearCompany Implementation Difference

A Personalized Process

When you become a ClearCompany client, we want you to hit the ground running rather than spend weeks on setup. Our team of Client Configuration Associates assists with software setup so you and your team can focus on learning how to use ClearCompany.

Our services are curated to deliver against your organization's business needs:

- ✓ Instructor-led training sessions guiding you through core features setup
- ✓ A dedicated Implementation Project Manager
- ✓ A project plan tailored to your business objectives
- ✓ Customizable roll-out resources

ClearCompany Implementation Services takes a consultative approach designed to meet each customer at their unique starting point.





Unmatched Assistance

ClearCompany's Implementation Team is second to none, and we know this thanks to our clients' stellar ratings and responses to our Implementation Survey. Getting in touch by phone or email is easy, and our team gets high marks for quick responses and resolutions.



Clients Love ClearCompany

9/10

average implementation rating
(2024)

9.5

Ease of Use Rating
(average 9.3)

9.6

Quality of Support Rating
(average 9.3)

9.4

Ease of Setup Rating
(average 9.1)

An Investment in Implementation

What makes the ClearCompany Implementation Experience so radically different? We don't just want to show you how to run a report, open a requisition, or build a performance review — we want to help you achieve your talent management goals.

That's why we provide tailored learning resources that match your team's preferences and ongoing support to help you maximize your software's value now and as your business grows.

We want you to get the most value possible from your investment in our software — so we invest in resources to help you use it most effectively.

What to Expect: The Implementation Process

Repeat for Each ClearCompany Module Purchased

1

Scope & Set Up

- Understand Your Requirements and Current Processes
- Define Features and Configuration Needs
- Set Project Timeline

2

Build & Learn

- Train Your Team
- Build and Configure Each Talent Module
- Deliver Project Milestones on Time

3

Test & Refine

- Evaluate Workflows and Communications
- Test and Troubleshoot
- Adjust and Refine

4

Plan & Launch

- Customize Launch Materials
- Activate Platform
- Manage Transition and Get Post-Launch Support

Client Resources & Support

The outstanding support ClearCompany provides doesn't end with implementation. Training and help options include always available online resources and dedicated support staff.

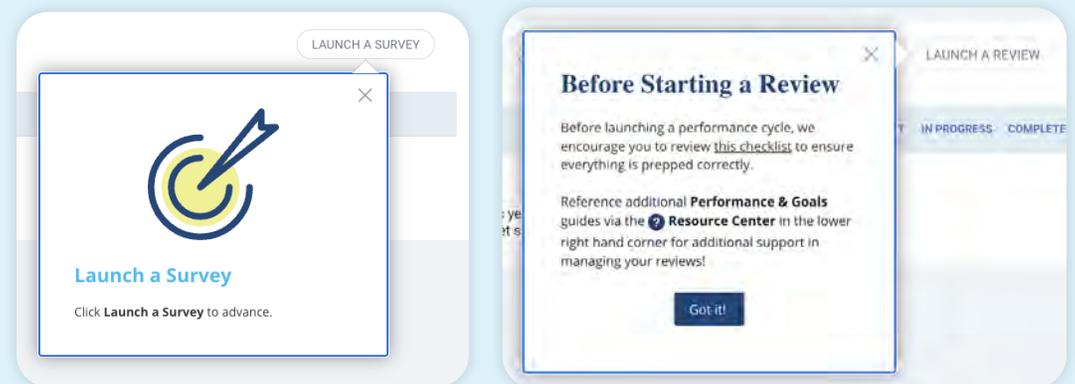
Some support services are available at an additional cost — ask your ClearCompany rep for details.

In-App Resources

As you use ClearCompany, you'll notice help prompts appear throughout the platform. Click on the prompts to get a help resource, which could be:

- ✓ A quick, hands-on walkthrough of the task you're working on (in the format of your choice)
- ✓ Tips for using the feature or tool you're working with
- ✓ Suggestions for more in-depth learning guides or courses

For example, if you're creating an employee survey, you can click on the tutorial prompt for help creating questions, selecting a rating scale, choosing recipients, and sending the survey.





Custom Training Bytes

Training Bytes are custom step-by-step tutorials for using ClearCompany based on your company's specific processes and strategies. With Training Bytes, you can cut down on the learning curve, questions, and first-time mistakes by training your employees on ClearCompany tools and your business processes at the same time.

Training Bytes are:

- ✔ Short, engaging, and hyper-focused to help users retain more information
- ✔ Available on-demand to fit users' schedules
- ✔ Available in a variety of formats to fit users' learning styles — try it, view it, slide it, watch it, or print it

Training Bytes help with a seamless rollout of your new ClearCompany software and drive adoption.

Custom Client Webinars

Custom webinar training sessions get employees up to speed on new software ASAP. With webinars, users can:

- ✔ Ask questions and get answers in real time.
- ✔ Attend remote training sessions from anywhere.
- ✔ Get access to custom webinar recordings after training concludes.



Custom Implementation Plans

Large organizations often need tailored support to ensure a smooth software rollout. ClearCompany experts guide you every step of the way:

- ✓ **Implementation Manager (IM):** Your IM will design a custom implementation plan and oversee the process to ensure a seamless transition.
- ✓ **Customer Success Manager (CSM):** After implementation, the CSM becomes your primary point of contact, leveraging their deep understanding of your needs and processes to provide ongoing support. Many of our CSMs are SHRM-certified, bringing an extra layer of HR expertise to your implementation process.
- ✓ **Account Manager (AM):** A product specialist, your AM will help you make the most of ClearCompany's tools and features, aligning them with your evolving business goals.

With ClearCompany, you get the expert advice you need to maximize your investment and achieve long-term success.

Training Center

Take courses designed for specific roles (e.g., hiring manager) and permissions levels in ClearCompany (e.g., Admin). Here, you can also find:

- ✓ Quick video tips that answer FAQs
- ✓ Best practices advice
- ✓ Information about recent product updates
- ✓ Prerecorded webinars



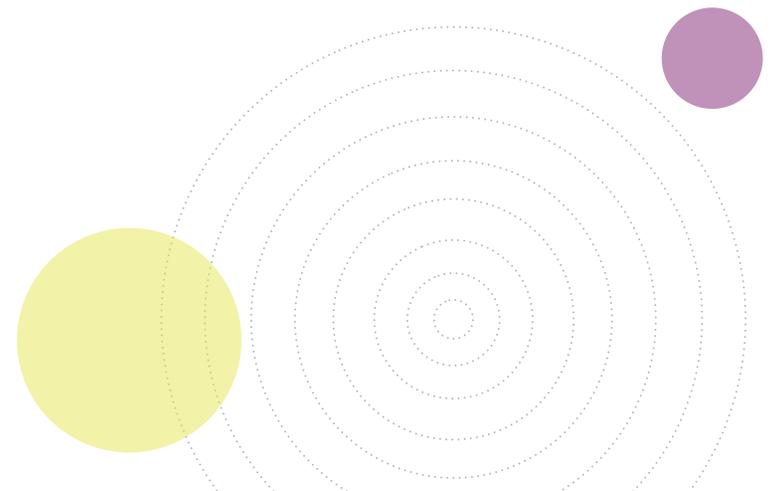
Help Center

The Help Center is where you can find detailed how-to articles for every ClearCompany feature. Can't find what you're looking for? Use the Help Center to submit a request for assistance to the Support team.

Ongoing Dedicated Client Success

After implementation, you're far from on your own. There's a team of specialists or a savvy account rep on hand, ready to help you maximize the potential of your ClearCompany solutions:

- ✓ Our Customer Support team is available to answer questions and resolve technical issues.
- ✓ Get personalized assistance with your own Customer Success Manager and Account Manager.
- ✓ The Customer Success Manager is your personal ClearCompany consultant, here to help you find the right tools for every task.
- ✓ Your Account Manager is your go-to for setting up new features and upgrading your software.



Client Success With ClearCompany

“I absolutely loved our implementation process.

Of course, with any implementation, it's a lot of information coming at you. It's overwhelming. We had someone that was super awesome working with us, explaining everything and running test runs. That's been awesome.

Sarah McDermott,
Human Resources Business Partner,
Packsize

“We got ClearCompany up and running in four or five weeks, and we didn't miss anything. The implementation team was great. We had a very clear pathway of what our next step was and then the step after that.

It was clearly very well-organized and structured.

Justin Strevig,
Talent & Retention Manager,
Rugby Architectural Building Products

“The implementation manager that we worked with was the best implementation manager I've worked with across any platform.

We feel like we really know the system, and we were able to really hit the ground running once we were turned loose. Implementation is a very clear strength of ClearCompany.

Stowe Beam,
Vice President of Human Resources,
SCS Global Services

“The implementation process was easy, and the support provided was incredible.

Debra H.,
via G2

[Read Real Case Studies](#)

