

Customer Onboarding Process

PHASE 1

The duration of this phase will depend on client availability for the set-up call and/or training and how quickly data can be provided

1 Signed contract

The first step is for a representative of your company to forward the completed and signed contract to our sales representative.

2 DAYS

- Upon reception of the signed contract, our accounting team will issue an invoice for all once-off billing, including the set-up fee.

2 Payment Confirmation

Once the invoice has been settled, a payment confirmation document must be sent to our team.

2 DAYS

3 Set-up Call

We will then arrange a set-up call during which we complete the set-up questionnaire together

- The setup questionnaire will be completed together by your Honeybee champion and our set-up specialist.
- Before integration and set-up can start, your relevant company data must be supplied to our set-up team.

Once we have your data, we will communicate the final go-live date via e-mail.

TIP

For the most comprehensive set-up possible, choose a Honeybee champion. This champion will be the go-to person for all things Honeybee. They will have advanced knowledge of the Honeybee system, as well as your business process, and will maintain harmony between Honeybee and your business.

We recommend that your Honeybee champion complete the training before the set-up call in order to ensure a high quality set-up.

PHASE 2

The duration of this phase will be determined by our service level agreement (SLA).

4 Integration and Set-up

2 - 4 WEEKS

Your Honeybee integration and set-up will be completed by our set-up team

- While the set-up process is in progress, you may start booking your team for training.

i INTEGRATION (SLA)

If there is no integration, setup will take two weeks. If either Dropbox or standard integration is selected, set-up will take four weeks. If a more advanced integration is selected, then set-up could potentially take more than four weeks, depending on the complexity of integration.

5 Billing

We will provide you with your login credentials, and our accounts team will start the billing cycle.

6 Go-Live

Go-live will be arranged by your account manager.

