BIGTIME

BigTime Implementation Guide

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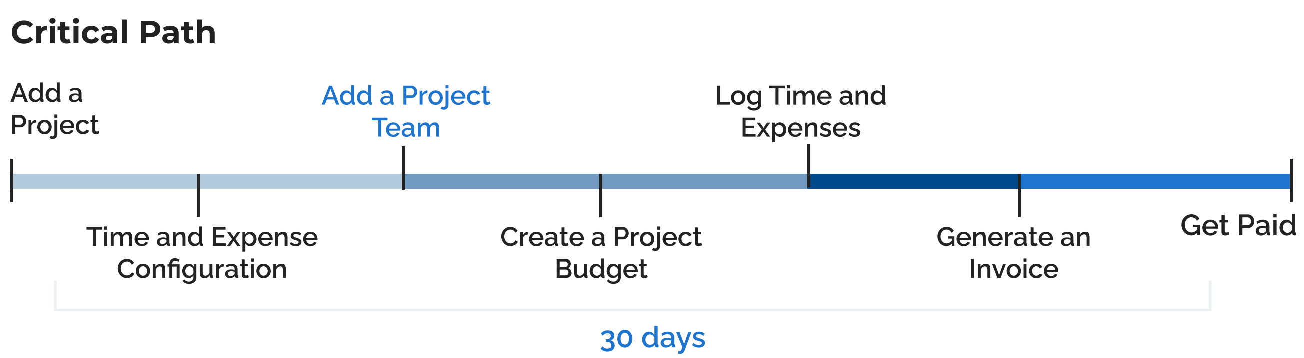
Welcome to BigTime

Time is money. That's why at BigTime, we pride ourselves on having one of the fastest average implementation times among PSA software providers.

It's our top priority that your work and billing cycle are not interrupted through your transition to BigTime. To ensure this, we structure our implementation process off of your firm's individual critical path, outlined below. The steps listed are the common 30-day workflow of a professional services firm, starting with the creation of a project, all the way to completing your billing cycle.

Your dedicated US-based implementation manager will walk through your firm's unique critical path, collecting information to customize your onboarding process depending on your firm's specific needs. From there, you'll work with our team until you are actively running a billing cycle in BigTime.



How do we cover all of this ground so quickly?

We have perfected the implementation process here at BigTime by helping thousands of professional services firms like yours get started with our software and start on a path to stronger operational management.

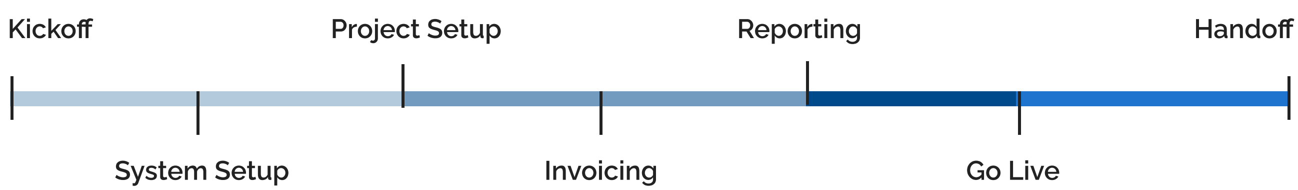
This guide outlines the implementation process and includes support resources that BigTime will offer you as our client. We value the importance of getting your team started on the right (and strongest) foot. Our training process is included for all new clients, but please note due to the individualized nature of our training, specifics of each session may vary to best fit your needs and tier of BigTime.

We look forward to working with you!

Erin Maxted,
Director of Implementation

Implementation Process

Training Timeline



Kickoff
System overview, project and staffer setup, time and expense workflow, project management basics.

System Setup
System overview, staffer setup, user rights permissions, company holiday calendar, and company lexicon.

Project Setup
Project setup, billing rates, and project management basics.

Invoicing
Configure invoicing defaults, invoicing workflow 101, customizing invoice templates.

Reporting
Report center overview, customizing pre-packaged reports, creation of new reports.

Go Live
Staff is ready to log in and start tracking time!

Handoff
Review of implementation, introduction to account/success resources.

Overview of Training Sessions

We don't believe in wasting any time, which is why our experienced implementation team works hard to make sure each onboarding session is tailored to fit your team's needs.

For the kick-off call, we invite your subject matter experts (most likely your future BigTime admins) to meet your dedicated implementation manager who will lead you throughout your onboarding process. This initial meeting is an interactive session designed to surface your strategic objectives and align our implementation sessions to your individual critical path.

From there, your manager will schedule your team's onboarding sessions and align each step to your critical path. To get a better feel for what to expect in each session, we've outlined below what the typical process looks like.

DATA MIGRATION

We understand this part of adopting new software is intimidating. How will the old fit with the new? To ease the transition and make it seamless, we have an in-house data import team that handles the entire migration of your firm's current data to BigTime with you.

If you opt-in for this additional service, it will happen in conjunction with your onboarding process so that you're seeing and using your own firm's data for training. If your firm uses a data warehouse, our data import team will also assist with this integration to ensure it is configured properly. We're here to help make this transition a smooth and easy one.

Kickoff

(30 minutes - 1 hour)

Agenda:

- Introduction to your dedicated implementation manager and their role.
- Discuss expectations for the onboarding training sessions, including which team members should join the calls and the timeline.
- Review your critical path and ensure training includes any specific requests for your businesses.
- Set goals and create a timeline for the date your BigTime site will go live.

Milestone:

The implementation team has all of the requirements properly outlined and the client's team is aware of the work needed and has had the chance to ask any questions before the work begins.

Training 1: System Setup

(1 hour)

Agenda:

- Gain a big-picture view into your system and where tools are located.
- Review timesheet settings and rules.
- Complete your BigTime Wallet application

Milestone:

At this point, your firm's project, staff, labor codes, expense codes, and templates will be imported. Your team should be able to successfully log time and expenses against the projects and budgets created.

Training 2: Data Migration/Integration

(30 minutes)

Please note this is an additional service offered by BigTime.

Agenda:

- Meet with the data import team.
- Determine the relationship of data.
- Verify field names.
- Fill out data import sheet.

Milestone:

You'll now be able to see your information set up in BigTIme.

Training 3: Project Setup / Time & Expense Configuration

(1 hour)

Agenda:

- Set up approval workflows for submitting time and expenses.
- Create budgets for your projects that time will be tracked and billed against.
- Work to set up projects, staffers, and user rights.

Milestone:

Now that your tasks and budgets are set up, you'll be able to start tracking time to projects.

Training 4: Invoicing

(1 hour)

Agenda:

- Review the invoicing workflow and set up approvals.
- Configure invoicing defaults specific to the way you bill.
- Create custom invoice templates with branded elements.
- If using BigTime Wallet, your account will be created to accept payments.

Milestone:

In this stage, you'll be able to see the progression in your critical path from logging time to getting paid. Your legacy data import of existing timesheets will be complete (only included in the data migration add-on service), and you will be able to generate new invoices using your custom defaults and templates. Time that has been tracked in BigTime is now reflected on invoices.

Training 5: Reporting and Resource Management

(1 hour)

Agenda:

- Overview of the reporting center and file structure.
- Review the existing system reports and their purpose.
- Customize prepackaged reports to your individual needs and KPIs.
- Walk through new report creation and field options.
- If you are a premier client, you will learn resource management and set up skills matching.

Milestone:

After this training, you'll see the critical path tying all together. Time, projects, invoices, and your allocated resources insights will all filter into your real-time reporting where you can see the data come to life.

Go Live & Handoff:
(30mins check-in Call)

Agenda:

- Review of your previous implementation training sessions.
- Answer any outstanding questions and resolve last-minute issues.
- Introduction to your customer success manager and ongoing support resources.

Milestone:

You are live! Your BigTime account will now be fully functioning and your team will be actively running a billing cycle. All data migration will have been completed and reports are ready to be used in real-time.

Onboarding Resources

Our implementation program is designed with a “train the trainer” approach. After subject matter experts from your firm complete onboarding, they will be equipped to roll out BigTime to staff internally. We believe this approach is the best to give your admins control over how quickly BigTime is phased out internally. This approach also ensures that you are self-sufficient when bringing on new staff at your firm.

Of course, we are always here to lend a hand when you need us. Your BigTime subscription gives you access to a variety of ongoing resources, including:

- Recordings of all your implementation sessions to watch back or share with your team at any time.
- BigTime Academy “how-to” videos give you a visual aid in a live environment. Watch a BigTime team member access and use features, from timers to invoices.
- New users will see a product walk-through with pop-up instructions upon logging in for the first time.
- Pre-recorded webinars explain specific topics like invoicing and reporting, in detail.
- Subscribe to the BigTime blog to stay up to date on industry news and content designed to help professional services businesses excel.

Ongoing Support

Knowledge Base

Go here for answers to common questions and problems. Here you'll find a storehouse of helpful articles, videos, and how-tos on a variety of subjects — from time tracking basics to more advanced tasks.

Support Team

Our support team is on hand every day to answer customer questions and get you moving in the right direction. With offices across the US, we're always a phone call or email away, no matter your timezone. The support team will be your main point of contact after implementation is completed for any technical needs related to your account.

- **Priority Email:** prioritysupport@bigtime.net
- **Priority Phone:** (312) 600-4090
- **Live Chat:** Through the "?" icon at the top right of the screen in your BigTime account. This service is available during support business hours.

Professional Services Team

As you strive for more, seek new knowledge, or encounter fresh challenges, our professional services team stands ready to assist. This team offers in-depth workflow training as well as insights into best practices, an in-depth analysis of your tech stack, and so much more. Curious to learn more about this service offering? Reach out to Erin here.

Take it from Our Clients

Real G2 reviews from current clients of BigTime on their training process.

Best implementation and easy to use. Aly was wonderful to work with during implementation. She was knowledgeable and very helpful throughout the process. BigTime saves us so much time with expenses and timesheets. I love the highly customizable reports.

Heather T

Excellent customer support! The software seems to have thought of every situation that could come up in the course of our business. There are many good software options but the customer service support is what it makes it feel like a real partnership between our company and BigTime. We know that they are committed to our success. All of our questions are answered promptly. Absolutely nothing to complain about on our end. All of our experiences have been completely positive.

Chris D

If you have additional questions on our implementation process, please contact your sales representative who will connect you with the appropriate member of our team.