BIGTIME

BigTime Implementation Guide

Table of Contents

1 Welcome to BigTime

3 Implementation Process

8 Onboarding resources

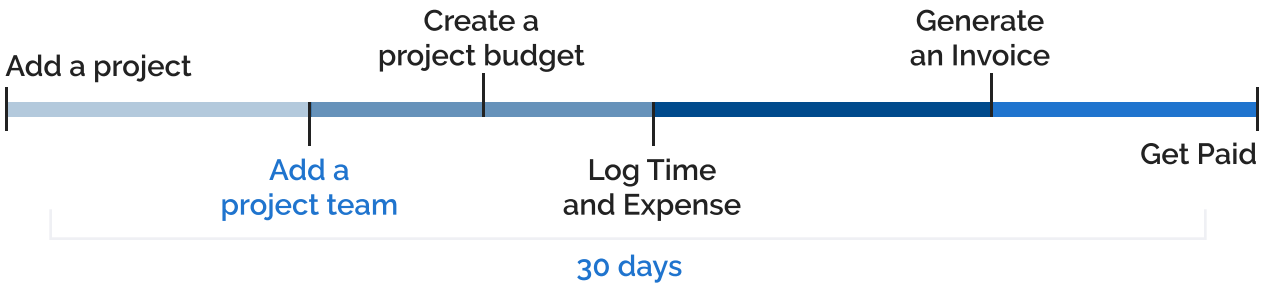
9 Ongoing support

Welcome to BigTime

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

It's our top priority that your work and billing cycle isn't 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 best cater your onboarding to your firm's specific needs and use case. From there you will work with our team until you are actively running a billing cycle in BigTime.

Critical Path



How do we cover all of this ground so quickly?

Our team has helped thousands of professional services firms, like yourself, implement our software and start on a path to stronger operational management. With more customers than any other software in our industry, we have perfected the implementation process.

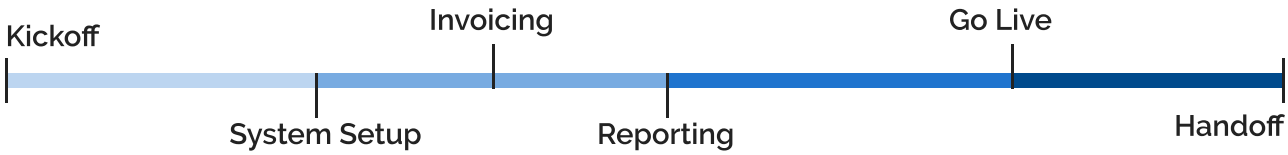
This guide outlines the implementation process and support resources that BigTime will offer you as our client. We value the importance of getting your team started on the right (and strongest) foot. Our implementation training process is included for all new clients, but please note due to the individualized 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,
Manager of Implementation

Implementation Process

Training Timeline



Kickoff
Interactive session designed to surface your strategic objectives and review your firm's critical path

System Setup
System overview, project and staffer set up, time and expense workflow, project management basics

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

Reporting
Report center overview, customizing prepackaged 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 be leading 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. Below we've outlined what the typical process looks like to get a feel for what to expect in each session.

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 who handles the entire migration of your firm's current data to BigTime with you.

This process happens in conjunction with your onboarding 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.

Kickoff

(30 minutes - 1 hour)

Agenda:

- Introduction to your dedicated Implementation Manager and their role
- Discuss expectations for the onboard 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 business
- 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
- Work to set up projects, staffers, and user rights
- Set up approval workflows for submitting time and expenses
- Create budgets for your projects that time will be tracked and billed against
- 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: 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 will 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, and you will be able to generate new invoices using your custom defaults and templates.

Training 3: 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 KPIs and needs
- Walkthrough 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:

(30-1 hour 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 in how quickly BigTime is phased out internally, and so you are self-sufficient when bringing new staff on to 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.
- An onboarding deck to help assist with training your staff and new hires on how to track time/expenses and manage projects.
- 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.
- Subscribing to our BigTime Blog will keep you up to date on our monthly product releases and industry news.

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 the 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 they're always a phone call or email away no matter your timezone. They 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.

The Ignite Innovation Council (IIC)

The Ignite Innovation Council (IIC), BigTime's Executive Advisory Council, is a group of visionary leaders from multiple professional services industries who take part in monthly meetings to discuss industry topics and trends and help shape the future of professional services automation software with BigTime.

The goal of the IIC is to spark innovative product ideas and to build the most user-friendly and intuitive professional service automation software through client feedback. Through monthly, consultative meetings with IIC members, our goal is to stay ahead of technology trends, learn what clients need to be even more successful, and improve our software. If you're interested in joining the IIC, please reach out to product@bigtime.net.

Take It From Our Clients

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

> *BigTime support is exceptional! Ben Kinsel is amazing! His ability to train 3 system administrators was excellent. bigTime is going to be our next step into the future of our industry. Thank you for taking the time to train us and answer any questions we had promptly! Our experience so far with BigTime and the training staff has been a 10.10!*
>
> ***Summer Rae Hisey***

> *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.