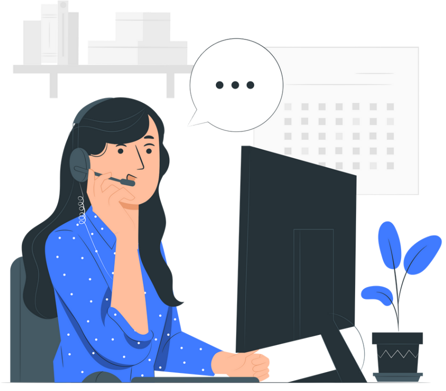
Your Onboarding on OOTI

Preparing well before onboarding

Good practices

1 Limit the number of participants

Training courses last between 1 and 1.5 hours and each is aimed at very specific roles within the agency. Don't forget to invite the right people for each topic (HR, project managers, partners).



Ideally, 2 to 3 participants per session, to guarantee the quality of the discussions.
All our training sessions are held by videoconference, during which you share your screen with us for 1.5 hours.

2 Be in good conditions

Choose a calm space and bring suitable equipment. Check that your microphone and camera are operational and choose a quiet, comfortable place. OOTI is a technical software and the sessions require concentration and attention, so make sure you're in the best possible condition !

3 Name an ambassador

During onboarding, you may have a lot of questions, so if you need to contact us between training sessions, don't hesitate to appoint a contact person.

Name an ambassador who will be in charge of contacting us and centralizing all the information. It's the easiest way to keep everyone in the loop !

4 Check before cancelling

Onboarding is a time commitment for both you and us.
Cancelling an appointment can therefore have repercussions for everyone. That's why we'd like to point out a few things :

- If your onboarding involves 4 sessions or less, you can cancel/move 2 times.
- If your onboarding consists of between 5 and 6 sessions, you can cancel/reschedule 3 times.

Beyond this limit, the training sessions will be considered lost.

AFTER EACH APPOINTMENT, WE'LL SEND YOU :

- A detailed, visual PDF report of the points discussed together
- A recording of the videoconference
- Items to prepare for the next session

Good to know : There's no need to duplicate your messages - all chats and emails arrive in the same place.

WELCOME TO YOUR OOTI ONBOARDING!

What's an onboarding ?

It's a personalized training and support on the OOTI software.

By importing and transferring your data, we prepare your future work tool !

We're your co-pilots !

Don't panic, any change requires time to adapt. Our Customer Success team is here to support you over several meetings.

Together, we'll set up your OOTI so that you become an expert in the field!

The objective ?

Give you the keys to managing your agency the best way possible !

You'll gain in time, efficiency and profitability.

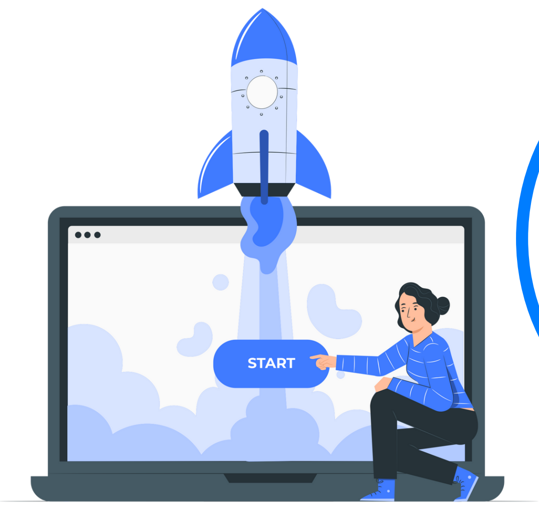
What's next...

On the following page, you'll find detailed steps for each module covered.

The steps can be adapted to suit your needs. If you don't want to tackle certain modules, you can!

The 5 steps* of onboarding with OOTI

*Steps can be adapted to suit your agency's needs



1 KICK OFF

2 INVOICING

3 COSTS

4 MANAGEMENT

5 TEAM TRAINING

The 5 steps* of onboarding with OOTI

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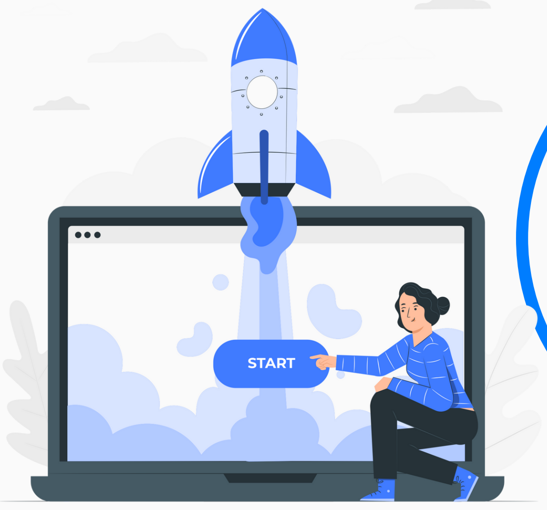

1

KICK OFF

- Account creation
- Import files
- Project creation
- Billing history

INVOICING

- Creation of the graphic charter
- Invoicing & financial year
- Billing forecast
- Setting agency time parameters
- Time management & entry
- Presentation of the costs module

2

3

COSTS

- Overheads
- Service provider invoices
- Payroll import
- Time history import
- OOTI customization

MANAGEMENT

- Budgets & roles
- Project budget
- Resource planning
- Data analysis
- Availability
- Reports
- Opportunities & proposals

4

5

TEAM TRAINING

- Time entry
- Expense reports
- Leave requests