MY C | Compliance Management

CUSTOMER SUPPORT PROCESS

"Fantastic support and easy to use"

"MY Compliance software has been a key tool in our compliance management for a number of years and it just continues to get better. It delivers exactly what we need, is really, really, really easy to use and the support from the team is without question fantastic!"

Saville Group

YOUR INTRODUCTION

3 Step Training Program

- Be introduced to your Customer Support Manager.
- Determine your Admin (Super) Users who will be trained on how to use and set up the software.
- You and your team will now be in control to deliver your own training and implementation.

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ONBOARDING

DEFINITION, TRAINING & IMPLEMENTATION

01/

In our initial call we will help you to determine who will be your “MY Compliance Management Champions” as these will be our main point of contact during your subscription. It is also vitally important for us to understand you as a business, your structure and how you want your staff to use the software.

02/

Next, we will help you to identify your priorities for implementation and rollout dates so that your training plan can be scheduled with estimated milestone objectives and reviews to ascertain your progress.

03/

From then on, our award winning Customer Support Team are ALWAYS on hand to support you throughout the whole process and with a dedicated Customer Support Manager to speak to should you need any assistance, you can rest assured that you will always get the help you need when you need it.

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CUSTOMER SUPPORT PLAN

We aim to create your Customer Support Plan within 7 days of becoming a customer.

The Customer Support Plan (CSP) will allow us to get to know a bit more about your business and allow us to identify what support you need from our team. It will enable us to set some intended outcomes and objectives and what we need to do to achieve them.

FINDING OUT ABOUT THE COMPANY

Finding out more about you as a business including employees, business structure, users etc.

IDENTIFYING KEY PERSONNEL DURING ONBOARDING

It's vitally important for us to identify your key users and 'MY Compliance Management Champions' so we know who to contact. The more contacts we have, the better we can support you during your subscription.

IDENTIFYING PRIORITIES AND SETTING OBJECTIVES

This part of our CSP is key, together we will identify the priorities to get the system up and running to support your implementation and roll out dates. We work with you towards achieving your goals in the time frames you require.

REVIEWING YOUR PROGRESS, TARGETS AND SETTING NEW ONES

We will review your CSP once you have achievedyour initial intended outcomes. Then we will agree your next targets and create the next phase of your CSP.

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THE NEXT STEPS

IMPROVE YOUR KNOWLEDGE

- Your Customer Support Managers will be able to share useful resources with you.

  Use the MY Advisor tool to learn about our modules.

  Have regular calls with your Customer Support Manager to keep your progress on track.

BEST PRACTICE

- Dial into our webinars to share best practise with others.

  Attend our annual User Forum and meet with other clients to and find out how they use it.

  Continual Development – Use your Customer Support Manager at every opportunity.

  Access the MY Advisor knowledge suite to ask us a question at any time.

FINDING 'MY WAY'

- Work with your Customer Support Manager to find your own way of doing things.

  Don't be afraid to try something different (think outside the box) – Our system is very flexible.

  Send over any examples/templates and let us support you in the best way to replicate these.

TYPICAL FIRST SIX MONTHS

MONTH ONE

CSP and initial training completed, 1st Modules set up and ready for roll out.

MONTH TWO

Continue to work through objectives while being trained on new areas of system.

MONTH THREE

Stakeholder commitment and most of the initial objectives achieved. Moving onto regular phone contact.

MONTH FOUR

Continue training MY Compliance Management Champions to understand how previous manual processes can be transferred into the system.

MONTH FIVE

Additional webinars to larger team to support a wider user base. Start internal review process ready to complete 6 month review of CSP.

Call should be booked in for review of CSP.

MONTH SIX

6 Month review and set new objectives for the next 6 months. We will continue this process and review on your renewal.

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