Strategic Workshop

ENTERPRISE ADVISORS

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Hyland®

AGENDA

- Challenge: Where to go from here?
- Strategic Workshop: Introduction
- Objectives
- How it works
- Deliverables
- Customer Example
- How to get started

YOUR CHALLENGES

- Undergoing organizational change
- Growing, evolving team
- Ready to do more
- Getting others to see the potential

STRATEGIC WORKSHOP INTRODUCTION

STRATEGIC WORKSHOP OBJECTIVES

- Work with you and your organization to:
  - Identify new ways to evolve your solution
  - Provide professional development guidance to your team
  - Develop an actionable roadmap
  - Assist with user adoption and leadership objectives
  - Manage accountability through regular check-ins and ongoing conversations

HOW IT WORKS

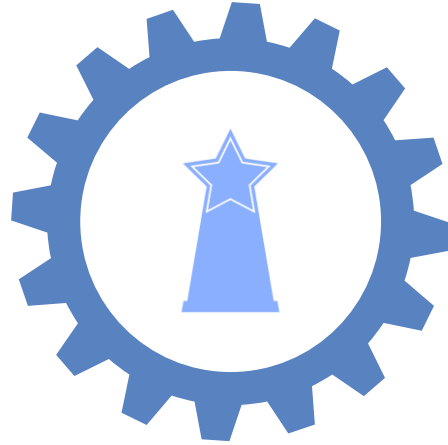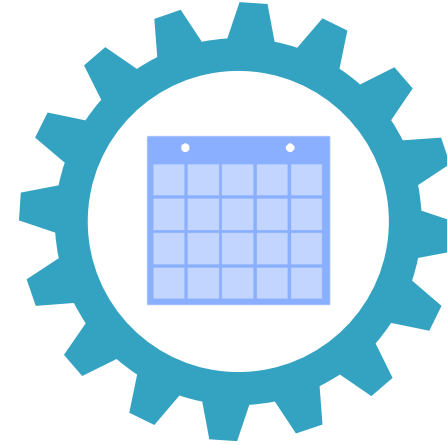|	Determine Appropriate Assessment	Prepare for Strategic Workshop	Onsite 2 Days	Develop Documentation / Recommendations	Deliver Documentation and Presentation	Follow Up 1/2/3/6/12 Months
Customer	🔍	☑ list	🏢		📄	🕐
Account Manager	🔍		🏢			🕐
Enterprise Advisor		☑ list	🏢	⚙	📄	🕐

DELIVERABLES

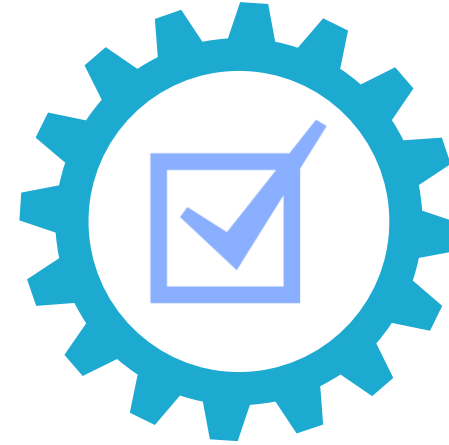Presentation and Document

Executive Summary

Prioritized Recommendations

Best Practices

Timeline

Regular Checkpoints

CUSTOMER EXAMPLE - FINDINGS

- Lack of long-term alignment strategy

- Missed implementation opportunities

- Limited technical knowledge

- Absence of end user adoption plan

- Insufficient user training and documentation

CUSTOMER EXAMPLE - RECOMMENDATIONS

1. Upgrade to the latest version
2. Maximize use of Hyland content management solution
3. Increase user adoption and promote education
4. Manage project balance

CUSTOMER EXAMPLE – CURRENT STATUS

- Upgrade complete
- Increased collaboration with IT
- Professional development progress
  - CommunityLIVE
  - TechQuest
  - Premium Subscription (training.hyland.com)
- Customer has active users on Hyland Community (community.hyland.com)

HOW TO GET STARTED

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To learn more, visit Hyland.com/Services, or ask our experts at Hyland.com/TalkToAnExpert.