



PROFESSIONAL ARCHIVE

ONBOARDING SERVICES



ACCELERATE YOUR DEPLOYMENT AND TIME TO VALUE

The Challenge

Implementation of software solutions can be complex, time-consuming and leave your organization exposed to a variety of risks. Many organizations lack dedicated personnel to manage the onboarding process and implement best practices that maximize the value of their solution.

Your organization needs an easy, fast way to ensure your solution is properly set up and that employees regularly using the solution are efficiently onboarded.

The Solution

Our Professional Archiving Onboarding Plans provide you with onboarding options that align to your specific business needs. Whether you want a fully customized plan that provides you with a dedicated resource for any and all of your implementation, training and support needs or if you just want to manage your own implementation and have Smarsh verify your work, we are here for you.

QuickStart: Self-guided onboarding with instructions delivered via email and help available online.

Standard: Onboarding with additional assistance; like screen-sharing configuration help and a knowledge-sharing session.

Advanced: Onboarding that includes a Smarsh Project Manager for large, complex deployments.

As every implementation is unique, extended onboarding engagements are available as needed. With our Onboarding Plans, you can focus on what matters while leaving the implementation and onboarding headache to our expert team.

For more information, contact your sales representative directly or email us at sales@smarsh.com.

Solutions Delivery Methodology





	QuickStart	Standard	Advanced	Custom
Delivery method	Remote	Remote	Remote	Remote/Onsite
Connections	Up to 200	200+	200+	200+
Archive package guidance	Silver, Gold, SMG	Gold, GOV, E-Discovery	Platinum, GOV, E-Discovery	N/A
Deployment timeframe ⁽¹⁾	up to 30 days	up to 30 days	up to 90 days	up to 90 days
Environment Configuration				
Solution review and planning kickoff	-	✓	✓	✓
Project Management (named Project Manager as single point of contact)	-	-	✓	Dedicated Technical Project Manager
Environment build	✓	✓	✓	✓
Multi-factor authentication	✓	✓	✓	✓
Create platform users and role-based access ⁽²⁾	1	Up to 5	5+	5+
Configuration instructions provided	Email	Email/ Web Conference	Email/ Web Conference	Web Conference/ Onsite
Guided review of configuration activities	-	✓	✓	✓
Configure Business Solutions hosting and basic encryption services <i>(if applicable)</i>	✓	✓	✓	✓
Bulk load archive users for Social Media and Verizon Wireless <i>(if applicable)</i>	Client	Smarsh	Smarsh	Smarsh
Confirmation/validation ⁽³⁾ of incoming data and platform configuration	Smarsh	Smarsh	Smarsh	Smarsh
Assistance with creation of retention policies	-	✓	✓	✓
Configure external archiver <i>(if applicable)</i>	✓	✓	✓	✓
Access to End User Communications Toolkit	-	-	✓	✓

	QuickStart	Standard	Advanced	Custom
Knowledge Transfer & Handoff				
Access to Online User Guides and Knowledge Base	✓	✓	✓	✓
Assistance with Support Rights configuration	-	✓	✓	✓
Knowledge transfer session(s) ⁽⁴⁾	-	1 hour	Up to 3 hours	TBD
Assistance with content usage and first invoice review	-	-	✓	✓
Transition to Outcome Management and Support Teams	Email	Email	Web Conference	Web Conference/ Onsite
Professional Services Fees <i>50% off additional channels⁽⁵⁾</i>	\$700 per channel	\$2,100 per channel	\$8,050 per channel	Starting at \$55,200, \$18,400 per 30-day extension <i>(no channel limit)</i>

Assumptions
(1) Smarsh is not responsible for any delays caused by the Customer, the Customer's contractors, or any of the Customer's third-party vendors or third-party service providers, or delays that are otherwise outside the control of Smarsh. Any such delays may result in an overall project cost increases, delay of estimated delivery dates and the re-assignment of the Smarsh project resource(s) to other Smarsh projects.
(2) Maximum dependent on Connected Archive Plan.
(3) Validation includes verification of directionality and confirmation data is being received/indexed, does not include data reconciliation.
(4) Training packages sold separately. Knowledge transfer must be completed within the timeframe indicated in the package from contract date. Knowledge transfer sessions may be recorded.
(5) The same onboarding package must be purchased for each channel when purchased together. 25% discount offered for channels added after initial implementation. WhatsApp and WeChat sold separately.
Valid workbook is completed by Customer, including account number and unique identifier for all participants <i>(if applicable)</i> .
Client is responsible for configuring any third-party products or services that Client may use with Smarsh Services, including any DNS changes that may be required.
Work will take place remotely between 9am and 5pm Pacific Standard/Daylight Time. ⁽⁶⁾

Add-ons	
⁽⁶⁾ Differential for work performed outside regular business hours	\$87 per hour
Required channel add-ons:	
Web and Video Archive	\$750 per domain
Mobile (included with Advanced)	\$1,200
Identity Management:	
Configuration of hierarchy (manual, non-LDIF) **	\$1,200 per 100 users
Configuration and provision single sign-on (SSO) <i>(not applicable for Silver or SMG packages)</i>	\$2,100
Automated configuration (LDIF) <i>(not applicable for Silver or SMG packages)</i>	\$1,800
Active Directory sync <i>(not applicable for Silver or SMG packages)</i>	\$6,000
Configuration of Advanced Email Encryption services	\$700
Supervision Architect (queues, hierarchy, custom roles, basic custom policies)	<i>Pricing based on Connected Archive package</i>
Policy testing and tuning to within 20% of policy performance target or up to 4 weeks post policy implementation <i>(recurring services also available)</i>	\$3,000
Custom policy creation or conversion	TBD
Data migration	<i>Sold Separately</i>
Training	<i>Sold Separately</i>

** Configuration is required for non-System Admin users to perform searches, please notify your Implementation Tech if you would like this feature disabled.