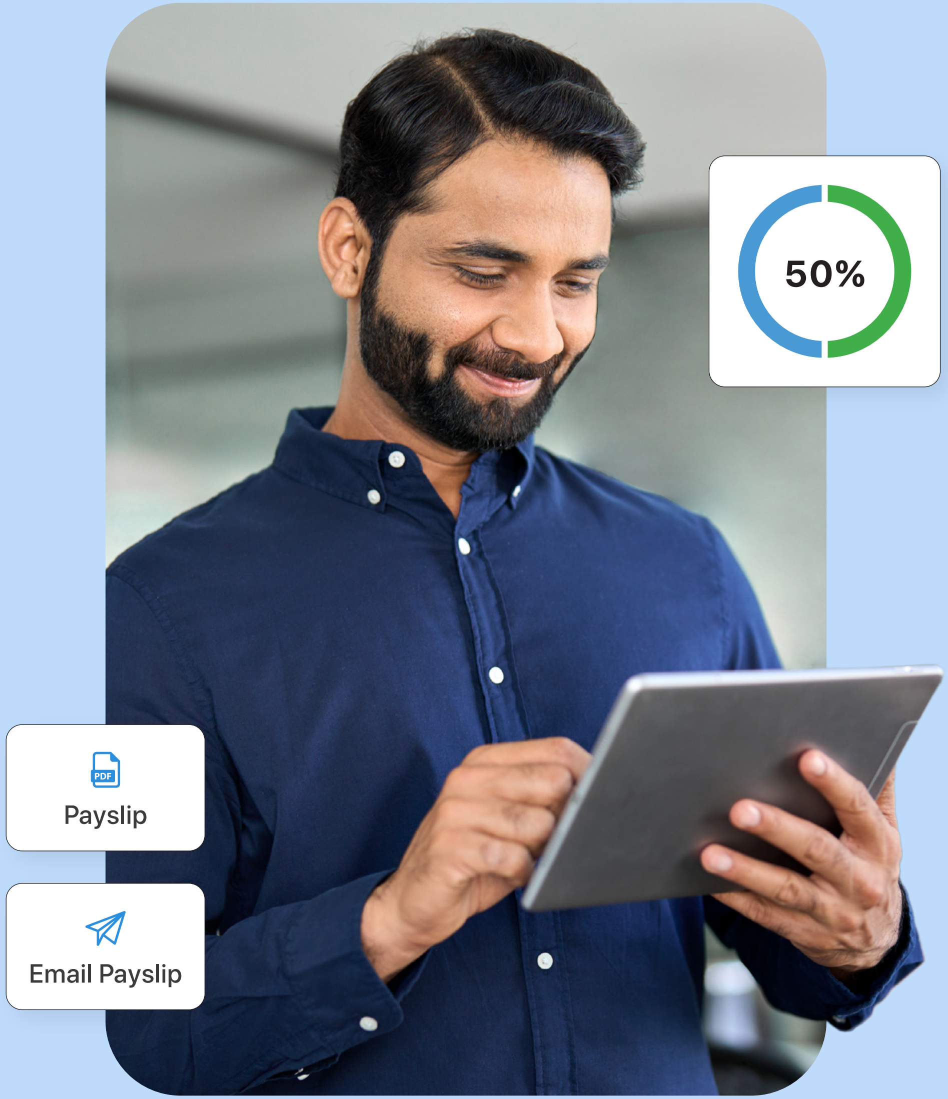
foundU

Implementation Overview

We can’t wait to see you go live in the foundU platform! Here are the next steps.



Customer Journey

01

Sales

Our experienced and knowledgeable sales team will work with you to ensure the foundU platform is right for your organisation.

We'll get to know your business and make recommendations on settings and packages to set you up for success.

02

Handover

Once an agreement has been signed, you will be introduced to your dedicated Implementations Manager to arrange a kick-off call.

03

Implementations

Your kick-off call will set the plan for your 5-Step Implementation.

We'll hold your hand through training, configuration, and your first live payrolls.

Implementation time frames vary by client.

04

Help Desk

Once you're live and feeling confident you'll get access to our phone and email support 7 days a week for any platform related queries you might have.

You can also access on-demand training webinars and our in-depth help centre.

05

Customer Success

After you've been using the platform for a few weeks, your new Customer Success Manager will reach out to check-in. They will be your guide on how to optimise platform usage.

Your CSM will also organise regular check-ins and platform reviews at a cadence of your choice.

Implementation Journey

01 Discovery

We get an in-depth understanding of your business and what you're trying to achieve. We help involve key stakeholders to get the full picture and gain buy-in from the start.

02 Info Gathering

The platform is powerful and needs your data. From banking details to awards, pay rules and existing employee data - we need it, and we can help you in preparing it. This can take a bit of time, but don't worry - once it's in, you're off.

03 Configuration

The foundU Implementation team works their magic, configuring the system to meet your goals. We clarify and consult with you as we go, and recommend more efficient ways to get the results you require.

While the Implementation team is working diligently in the background, we will get you to jump in and start working through our training modules so that you can be ready for what comes next.

04 Validate & Test

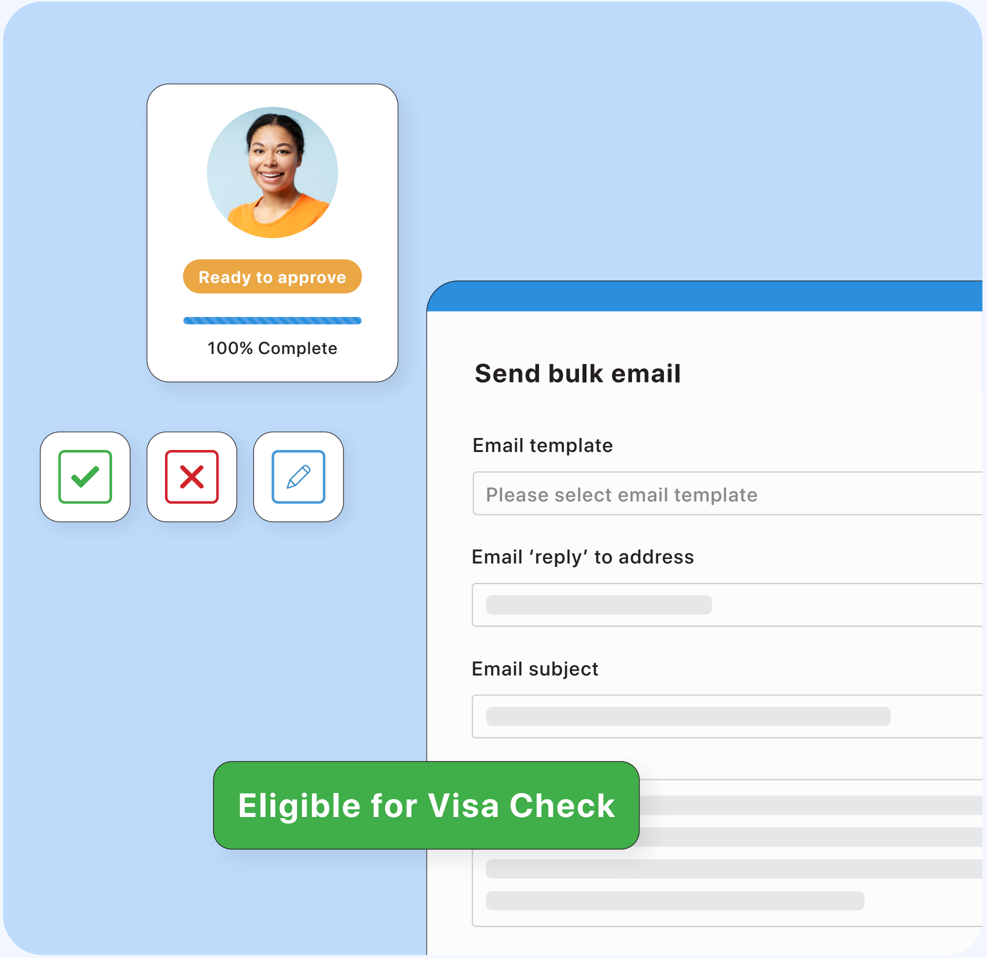
Here comes the fun part! We give you access to your platform to use your own data and workflows, enabling you to intuitively up-skill. We show you how to validate data, test processes and perform parallel pay runs to make sure every pay rule is firing. You start to see just how much time you save, and how much visibility and control you have.

05 Go-Live

Your first payroll signals your graduation from implementation to operational. You've done it! Don't worry though - our Customer Success team will help you leverage the full potential of your platform. You can also request custom training collateral for your team, or book custom training sessions.

01 Discovery

- Introduction
- Understand Motivators and Key Success Indicators
- Overview of Customer Journey
- Overview of Implementation Process
- Confirm Key Contacts
- Information Gathering Expectations
- General Business Understanding
- Communication Expectations
- Confirm Awareness of Limitations
- Determine Milestones and Plan



02 Information Gathering

Business Info

- Platform URL
- Entity Information
- Organisational Structure
- Costing Structure
- Reporting Structure
- Contact Information
- Communication Preferences
- Payroll Tax States
- Locations
- User Levels

Payroll

- Pay Periods
- Awards/Agreements
- Allowances
- Deductions
- Leave/Leave Processes
- Default Super/Super Rules
- WorkCover Rates
- Cost Codes
- Public Holidays
- STP Codes
- ABA Details
- Reimbursements

Onboarding

- Recruitment Forms
- Onboarding Forms
- Onboarding Processes
- Policies and Documents
- Employment Agreements
- Compliance Information
- Qualifications
- Checklists
- Custom Fields
- Tag Libraries

Data Transfer

- Users and Levels
- Employee Information CSV
    - Advanced
    - Basic
- Employee Positions
- Employee Leave Balances

Time & Attendance

- Roster Names
- T&A Preferences
    - Submit
    - Clock
    - Geo-Location
- Time-Snap Settings
- Attendance Codes
- Performance Codes

Add-Ons

- Single Sign On
- SMS
- Beam
- Recruit Wizard
- Scout Talent
- GO1
- Allara Learning
- Wageflo
- HR Assured
- Custom Integrations

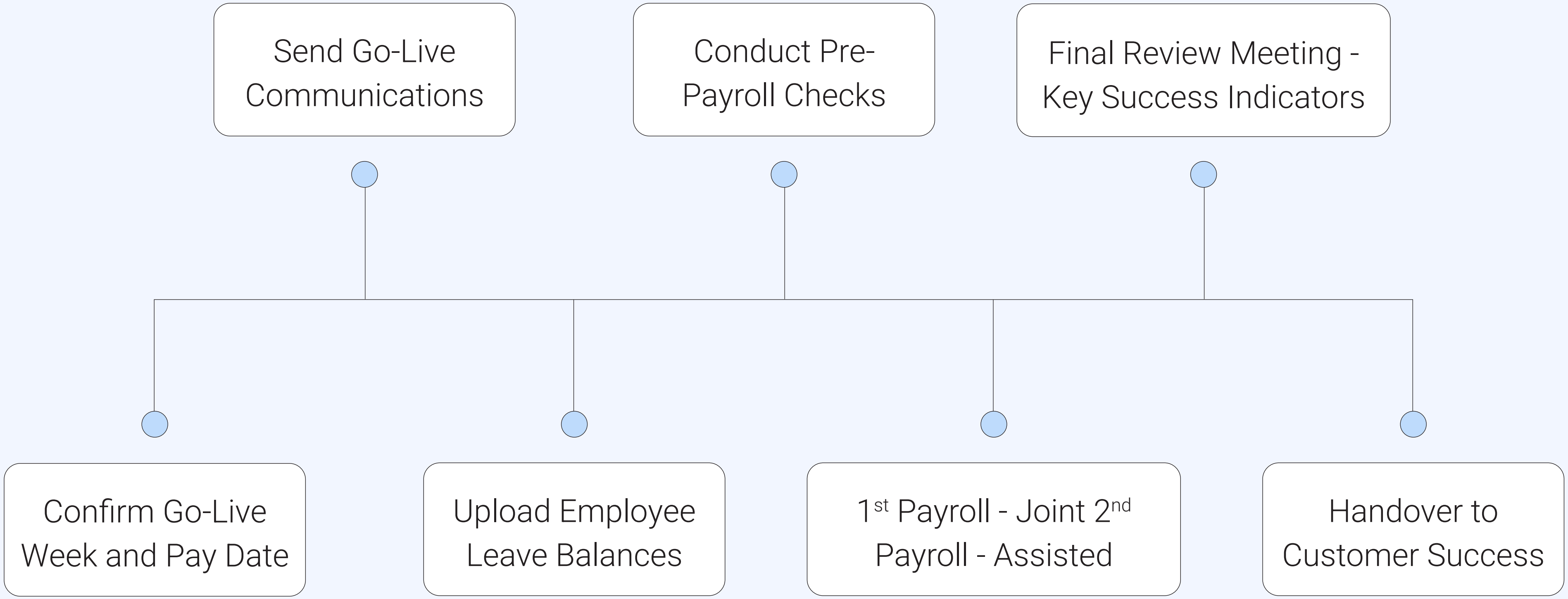
03 Configuration

Onboarding / HR	Time & Attendance	Payroll	General	Communications
• Onboarding Flows • Checklists • Notification Settings • Comms Templates • Tag Groups • Position Set Up • Custom Field Creation • Training Set Up • Employee Agreement Templates • Employee Settings	• Roster Set Up • Clock Settings • iPad Set Up Onsite • Clock Passcode Set Up	• Award Interpretation Superannuation Set Up • Beam Set Up • Operation Settings • Operations Rates Books • Cost Code Set Ups • Payroll Tax States • WIC Set Up • Public Holiday Check • Leave Types • STP Phase 2 Set Up • Other Pay Rules • ABA Information	• Entity Set Up • Create User Groups • Add Users • Upload Employee Data	• SMS Set Up • Email Set Up **To Employees:** Onboarding Email **To Managers:** Training Emails

04 Validation & Training

<table>
<tr><th></th><th>Customer</th><th>foundU</th></tr>
<tr><td>General</td><td>Undertake platform training:
• Self-paced online sessions
• Help desk
• Custom training sessions</td><td>• Book testing meeting
• Walk through testing process
• Platform functionality:
  • Employee onboarding
  • Rostering and clocking
  • Shift approvals
  • Reporting
  • User access</td></tr>
<tr><td rowspan="2">Payroll</td><td>• Create test cases by rostering and approving shifts/leave
• Ensure the employees and hours match in both systems
• Provide pay reports in a useable format for comparison</td><td>• Compare customer pay reports with foundU data
• Present comparison
• Make appropriate adjustments to pay rules</td></tr>
<tr><td colspan="2">• Identify and interpret variances between the data comparisons
• Update customer processes as required
• Agree on Go Live processes and timeline (minimum of two payrolls to be completed)</td></tr>
</table>

05 Go-Live


Send Go-Live Communications
Conduct Pre-Payroll Checks
Final Review Meeting - Key Success Indicators
Confirm Go-Live Week and Pay Date
Upload Employee Leave Balances
1st Payroll - Joint 2nd Payroll - Assisted
Handover to Customer Success

Contact us for more info

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