



30 DAY GO-LIVE CHALLENGE

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OVERVIEW

DocketManager's FREE 30 Day Go-Live Challenge

This challenge is designed to get your site live within 30 days by assisting shop owners and their employees through assessment meetings, individual training sessions, and group webinars. The end goal is to enable our clients to focus on bigger picture items that may be stalling the going live process.

Not only do we want you to be successful, but with your commitment to this challenge **we will pay you to be successful.**

If this sounds like a good fit for you, keep reading.



"The true
entrepreneur is a
doer, not a dreamer."

NOLAN BUSHNELL

WELCOME TO THE CHALLENGE

How to get started...

All participants will be invited to attend the 30 Day Go-Live Challenge **introduction session**.

Topics that will be discussed in this session:

- The challenges that are currently holding you back
- How to shift into the Who and Why, opposed to focusing on the What
- The exact method to translate your unique processes into the ultimate print management system
- How to master your mindset to build the business you deserve

This challenge can transform your business. In order to complete this challenge you will need to be committed and meet certain expectations. We are committed to and we are here to help you achieve your goals.

It's simple... if you don't follow the rules you won't get paid. So, if you're serious about getting a head start on your business strategy and increasing your profit while getting PAID to do it, be sure to participate in this challenge!

The Rules

Rule #1: Participants **MUST** attend all scheduled events and complete the corresponding tasks.

Rule #2: Participants **MUST** assign (as least) one employee to attend the designated employee training sessions.

Rule #3: Participants **MUST** feel 100% confident in their DocketManager system by the end of the challenge, including adjusting their system settings, navigating price testing principles, and training their employees on how to use DocketManager.

Rule #4: Participants **MUST** continue to use DocketManager 100% until their final check-in.



TRAINING SESSIONS

Many DocketManager shops are running with limited staff and increased workloads. We know your time is precious, so we've developed this part of the challenge to guide your employees through the DocketManager basics.

The next step in the 30 Day Go Live Challenge is to delegate one of your employees to become your **Employee Training Master**. In order to meet the requirements of the challenge, this designated employee **must attend all training sessions listed in the webinar list**.

This offering allows shop owners to focus on bigger picture items knowing that the employees are in capable hands. The chosen employee must attend all the webinars listed to complete this challenge, but any and all employees are encouraged to attend to increase employee training success rate.

WEBINAR LIST

Webinar attendance requirements for designated **Employee Training Master**:

Mandatory

- Navigation/Settings
- CRM/Quotes/Orders
- Production/Invoicing
- Proofing/Timers
- CSR/Shipping/Production
- Prepress/Graphics Designer

Non-Mandatory

- Job Templates/Products
- Point of Sale/Customer Goods
- Canned Emails/Documents
- Products/Themes/Portals
- Online Configuration
- Variable Templates
- Point of Sale/Customer Goods

Visit **www.docketmanager.com/webinar** to view the webinar schedule & sign up.

PROGRESS ASSESSMENT #1

What to expect during your first session

We'll get in touch and schedule your initial session in advance. This session will commence the first week of the challenge and runs one-hour in length. During this session your onboarding specialist will review your progress and outline the exact steps you need to take to get live on DocketManager.

Before your initial session, you must review the **Go Live Checklist** that we sent to your email and check off all items that have been completed, and the items that have not been completed. Each participant receives a one-hour session with their onboarding specialist, so it's up to you to complete this task in order to get the most out of your initial progress assessment session.

Once the Go Live Checklist has been reviewed by your onboarding specialist, you will be given a task list of items to complete during this challenge. All participants must complete their assigned task list in order to successfully complete the 30 Day Go-Live Challenge.

How to Prepare

1. Download the Go-Live Checklist
2. Review Checklist & mark all completed items.
3. Accept your progress assessment calendar invite.
4. Ensure you've chosen an Employee Training Master and that they have signed up for all the mandatory training sessions.

What We Suggest

Sign up for the training webinars in advance. Your designated Employee Training Master will be covering the basics, so we recommend shop owners/managers sign up for the following webinars for the best results:

- Proofing/Timers
- CSR/Shipping/Production
- Prepress/Graphics Designer
- Job Templates/Products
- Point of Sale/Customer Goods
- Canned Emails/Documents
- Products/Themes/Portals
- Online Configuration
- Variable Templates
- Point of Sale/Customer Goods

visit www.docketmanager.com/webinar



GROUP ACCOUNTING SESSION

At this point in the challenge, you and your team have been busy at work learning more about your DocketManager system and completing the task list assigned by your onboarding specialist.

Now it's time for all participants to attend the **Group Accounting Session**. In this one-hour session, we will meet with all participants of the challenge to cover accounting training required to be successful with your DocketManager system.

WHAT WE'LL COVER

In this Accounting session, we will walk through moving an open order through production and following it to the Invoicing Queue. We will then discuss how to apply an approved total and the functionality behind this feature of the system. Next, we will post the order and work with it in the Accounting tab. In the accounting tab, we will discuss deposits, payments, revenue and GL account breakdowns, as well as Closeouts and Commissions.

PROGRESS ASSESSMENT #2

What to expect during this session

During the 2nd week of the 30 Day Go-Live Challenge, your onboarding specialist will meet with progress assessment #2.

During this one-hour meeting, your onboarding specialist will discuss the task list that was provided and address any incomplete tasks, ensure your Employee Training Master has scheduled all the required webinars, and work with you to resolve any lingering issues preventing you and your team from continuing with the challenge successfully.

Your onboarding specialist will prepare you and your team for the Soft Launch phase of the challenge, and schedule the closing assessment before going live.

How to Prepare

1. Set a reminder for progress assessment #2 to ensure you do not miss your designated time slot.
2. Record all questions you'd like to ask your onboarding specialist.
3. Be prepared for a one-hour meeting and prioritize the question list from most important to least.
4. Ensure your work station is set up in advance and your internet connection and computer are working 10 minutes prior to your meeting.



SOFT LAUNCH

It's time to prepare for the soft launch!

You may never feel 100% ready to Go Live, but we're here to minimize your fears. The third week of the 30 day challenge will be dedicated to running DocketManager in tandem with your current MIS system for 1-2 of your largest clients.

This process will allow you to discover any inconsistencies in pricing and workflow. During this soft launch, we will be meeting to discuss any issues that arise.

PROGRESS ASSESSMENT #3

During the soft launch week, we will be meeting for Progress Assessment #3 to ensure you're on track.

During this session, we will discuss and resolve any issues that you've been experiencing so you can Go Live with confidence.

**Prior to Going Live all of your price testing and soft launch orders can be removed from your system providing you with a clean slate.*

PROGRESS ASSESSMENT #4

What to expect during this session

During the 4th week of the 30 Day Go-Live Challenge your onboarding specialist will schedule an ideal time to meet for Progress Assessment #4.

During this one-hour meeting, your onboarding specialist will discuss any remaining items on your task list, ensure your Employee Training Master attended all the required webinars, and confirm that all items on the Going Live Checklist have been completed.

There will only be a few days left before the end of the challenge, so this progress assessment will ensure you're on track to successfully complete the required components.

How to Prepare:

1. Set a reminder for progress assessment #2 to ensure you do not miss your designated time slot.
2. Record all questions you'd like to ask your onboarding specialist.
3. Be prepared for a one-hour meeting and prioritize the question list from most important to least.
4. Ensure your work station is set up in advance and your internet connection and computer are working 10 minutes prior to your meeting
5. Ensure your designated Employee Training Master has attended all of the following webinars:

Navigation/Settings
CRM/Quotes/Orders
Production/Invoicing
Proofing/Timers
CSR/Shipping/Production
Prepress/Graphics Designer



FINAL REVIEW

It's time for the final review with all 30 Day Go-Live Challenge Participants! During this session we will discuss what went well, what didn't go so well, and how our community can provide support to one another.

All participants who make it to the final review have completed all group sessions, meetings, and webinar attendances! However, there is one final step to secure the cash reward! All participants must abide by **Rule #4**: Participants **MUST** continue to use DocketManager 100% until their final check-in.

FINAL CHECK-IN

Your onboarding specialist will be scheduling a final check-in to ensure you and your company have continued to go live and have been using DocketManager consistently since the last time you met.

Think of this check-in as an opportunity to showcase all of the amazing work you and your team have been putting in, as well as taking the time to ask any final questions to ensure your continued success.

If during this session you can showcase that you have been 100% committed to the process, we will be rewarding you with a **FREE** cash reward.

"Some people
dream of success,
while other people
get up every
morning and make
it happen."

WAYNE HUIZENGA



NOVEMBER SCHEDULE

Group Intro Session

Tuesday, November 17th, 2020
2:00-3:00pm EST/11:00-12:00pm PST

Individual Progress Assessment #1

Wednesday, November 18th or
Thursday, November 19th

Employee Webinar Series

Tuesday, November 17th, 2020 -
Wednesday, December 30th

Group Accounting Session

Tuesday, November 24th, 2020
2:00-3:00pm EST/11:00-12:00pm PST

Individual Progress Assessment #2

Wednesday, November 25th or
Thursday, November 26th

DECEMBER SCHEDULE

Soft Launch Week Begins

Tuesday, December 1st, 2020

Individual Progress Assessment #3

Wednesday, December 2nd or
Thursday, December 3rd

Individual Progress Assessment #4

Wednesday, December 9th or
Thursday, December 10th

Final Review Group Session

Tuesday, December 15th, 2020
2:00-3:00pm EST/11:00-12:00pm PST

Individual Progress Assessment #5

Tuesday, December 29th or
Wednesday, December 30th

Challenge Complete!