Beyond the Project: Long-Term Success

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Congratulations—you've successfully completed your project! We're excited for you to begin your journey into long-term success with Resolver, Here are our best practices to help you hit the ground running, and ensure you achieve your goals with us.

Week 1: Important Information Reminder

Keep the momentum going!

Remember, adopting a new software can be a major change for your front-line employees. Fostering the behaviour changes that come with a new system calls for continuous follow-up. It's important to smooth the path for your users, and ensure that they have everything they need to perform their tasks.

We recommend sending an email one week after you've gone live with Resolver to remind users where to find important information. For example:

- Link to your Production environment
- Links to where the training materials are located
- Contact information of who they need to go to internally if they run into questions, issues, or have feedback

The most common roadblock for new users? They need a hand resetting their password. A link to the article may help:
https://help.resolver.com/help/reset-your-password

Month 1: End User Check In

Don't wait for your users to come to you—request feedback proactively.

We recommend scheduling a check-in with your users at the four-week mark. This is the point in your journey where users' needs will start to evolve. After using Resolver for a month, their focus tends to shift away from simple tasks, like needing login details, and move towards their long-term performance, like getting entering data in the system.

Try a quick pulse check with selected users to get a sense of how they're doing. Ask questions like:

- On a scale from 1-5 (1 being easy, 5 being difficult), how easy is it to capture data?
- What additional clarification and/or training is required?
- How has Resolver changed your day-to-day workflow?

This check-in aligns with your One month check in with your Customer Success Manager. During this meeting they will want to hear feedback on adoption and any general questions you may have. Please come prepared with answers to the questions above from week 1 and week 4.

Month 2: Get cozy with your data

After two months, you might be tempted to start pushing the envelope.

Your users have logged in, they've been entering data, and they're getting comfortable using Resolver regularly. Now it's time to turn your attention to the critical insights you can draw from Resolver, and what they mean to your organization.

We recommend running reports, looking at the data, and asking yourself:

- Am I capturing the right information to report to Executives? Or Board?
- What else could we look at?
- Do I need additional fields or graphs within these reports to really tell the story about the data we are capturing
- Now that we have this data, do we need additional reports to drill into the data?
- What conclusions can we draw from the data? What are we learning from this data that we didn't know before?

Don't forget: If you need help updating reports, our Customer Success Community is here to help. Here are some articles other customers have found useful:

- This report is great, apart from one small detail. How do I fix it?
    - https://help.resolver.com/help/edit-a-report
- My reports show me way too much data, I can't possibly make sense of it all. How do I narrow it down?
    - https://help.resolver.com/help/add-filters
- I'm feeling confident! What else can I do with my reports?
    - https://help.resolver.com/help/report-elements
- My exec team would be over the moon if I could easily show them trends over time. Can I do it myself?
    - https://help.resolver.com/help/trending-tables

Month 3: Resolver Feedback

We always welcome your feedback, and we're very interested in hearing about your experience after going live with Resolver.

Some of our customers complete a Feedback session after they have been live with us for a few months. It's a great opportunity for your team to get together and discuss a "stop, start and continue” of what is working well, and what things could be improved upon. Think about:

What’s going well for you and your team?

What would you recommend we stop doing?

What can we improve?

We’d love to schedule a feedback session with your team and really get a feel for your experience. This is something we do quite a bit at Resolver, so we’d be happy to give you pointers. This also aligns with the Quarterly Business Review you have with your Customer Success Manager. In this meeting we invite you to talk through the feedback you’ve received internally. We also use this opportunity to look at your experience holistically by reviewing solution focused feedback and Resolver team experience.

Month 4 and beyond: End User Check Ins

As you progress through your first year with Resolver, we recommend checking in with your end users and the organization every quarter.

Yeah, we know…it sounds like a lot!

It’s important to remember that over time your needs as an organization change and mature. Many customers report that using Resolver rapidly drives the maturity of their program forward, and you may outgrow some processes as this occurs. Checking in frequently means you can catch your growing pains in a timely manner and address them proactively.

The information you gather can also feed into the Quarterly Business Reviews with your Customer Success Manager to ensure we are continuing to grow with you.

You may want to ask the same questions as before so you can see any trends. Ask your users:

- On a scale from 1-5 (1 being easy, 5 being difficult), how easy is it to capture data?
- What additional clarification and/or training required?
- How has Resolver changed your day-to-day workflow?

You may also want to gather feedback from the rest of the organization, including your Executives and/or Board. Try asking:

- Are there any key insights they would like to see?
- Are they getting the information they need to make informed strategic decisions?