

Access Trail Evo

# FlightPath

**Service Overview**


Together we'll land this implementation



# Contents



By the end of this document, you'll be well-prepared to choose the FlightPath that best suits your needs.

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*We believe wholeheartedly that the functionality that our software offers our customers is very important, but it is only half of the value equation. How the system is rolled out is critical if full value from your new investment is to be achieved.*

- **Fabrice Dreneau, Chief Customer Success Officer, Access Group**

## About

Each FlightPath implementation programme from Access follows a well-defined journey. Our aim is to give you value from your investment as quickly and as fully as possible. Using our years of software deployment expertise, we have defined the FlightPath methodology.

### Typical Questions

- How can we ensure a successful outcome?
- How quickly will we get a return on investment?
- How quickly will my colleagues adopt the new software?
- How will I be supported?

### Our Response

Our FlightPath methodology means:

- We proactively monitor your progress using real-time data to ensure you achieve your outcomes
- We put the software in your hands at the earliest opportunity with in-product checklists and guides to get you started
- Post go-live, our Adoption Team drives system adoption with curated content based on insights from our most successful customers
- You will have access to instant support through our chat-bot & access to our Adoption Team through live-chat

### Our Commitment

- We will ensure that roles and responsibilities are completely clear
- We are transparent on your effort commitment
- We will set expectations on project duration
- We will remain by your side until your FlightPath Outcomes have been achieved



## Access Trail Evo

### Our Promise

**Access Trail Evo FlightPaths** help you get the most out of **Access Evo** from day one, with easy setup and tailored guidance to unlock its full potential fast.

### Access Evo Functionality

- ✓ **Policies and Procedures:** Instant access to policies, procedures, and other key documents in one central, secure location.
- ✓ **Real-time push notifications** to keep your teams informed, aligned, and ready to act.
- ✓ **Copilot:** Your AI-powered Assistant allows you to ask questions like “Which team members haven’t acknowledged the new Fire Safety Policy?” or “How do I report an accident?” and get instant, AI-powered answers.
- ✓ **Mobile Apps:** Download Access Evo Mobile App on iOS or Google Play Store. Increase productivity and monitoring on the go!
- ✓ **Feed:** Instant alerts for newly assigned policies, task completion updates, and other key activity that helps keep teams informed and accountable.

**Landing Access Evo**  
We'll help you land Access Evo through:

### 1-2-1 Remote Onboarding Workshops

A dedicated consultant helping you to understand and adopt the new features and functionality in Trail Evo.

### E-Learning Courses

Engaging and comprehensive e-learning courses to help you and your staff successfully embed Access Evo into your everyday business processes.



# Access Trail Evo FlightPath A Overview

## Customer Profile:

A FlightPath for customers with 1-8 sites. This Flightpath is best suited to customers with a smaller number of sites which will be rolled out in a single phase.

## FlightPath Outcomes

Following your FlightPath, you will:



Have created your sites to allow visibility between all sites in your organisation.



Have invited your users to all sites so they can make the most out of Access Trail Evo.



Have created your custom tasklists so you can work through each days to do list.



Have set your sites live enabling the use of your dashboard and reporting for key data.



Have set your business hours so you can complete the right tasks at the right times.

## Customer Effort

A typical FlightPath requires 5-7 hours effort from your team to go live with your new system.

## Typical Duration

70% of our customers go live with their system within 6 weeks.

## Optimal Duration

Customers with the capacity to complete their activities quickly take as little as 5 week from purchase to go-live.

## FlightPath Experience

This is a largely Digital First Experience with Onboarder led sessions. Your Onboarder will deliver training and alongside guidance through in-product tours with live-chat support from our dedicated FlightPath Adoption Team.\*

# Access Trail Evo FlightPath B Overview

## Customer Profile:

A FlightPath for customers with 9-20 sites. Suited to customers who wish to roll out the sites in up to 3 phases.

## FlightPath Outcomes

Following your FlightPath, you will:



Have created your sites which will allow visibility between all sites in your organisation.



Have invited your users to all sites so they can make the most out of Access Trail Evo.



Have created your custom tasklists so you can work through each days to do list.



Have set your sites live enabling the use of your dashboard and reporting for key data.



Have set your business hours so you can complete the right tasks at the right times.

## Customer Effort

A typical FlightPath requires 7-9 hours effort from your team to go live with your new system.

## Typical Duration

70% of our customers go live with their system within 8 weeks.

## Optimal Duration

Customers with the capacity to complete their activities quickly take as little as 7 weeks from purchase to go-live.

## FlightPath Experience

This is a largely Digital First Experience with Onboarder led sessions. Your Onboarder will deliver training and alongside guidance through in-product tours with live-chat support from our dedicated FlightPath Adoption Team.\*

\* Refer to the Service Summary slide for a detailed breakdown of your FlightPath

# Access Trail Evo FlightPath C Overview

## Customer Profile:

A FlightPath for customers with 21-50 sites. Suited to customers who wish to roll out their sites in up to 4 phases.

## FlightPath Outcomes

Following your FlightPath, you will:



Have created your sites which will allow visibility between all sites in your organisation.



Have invited your users to all sites so they can make the most out of Access Trail Evo.



Have created your custom tasklists so you can work through each days to do list.



Have set your sites live enabling the use of your dashboard and reporting for key data.



Have set your business hours so you can complete the right tasks at the right times.

## Customer Effort

A typical FlightPath requires 10-12 hours effort from your team to go live with your new system.

## Typical Duration

70% of our customers go live with their system within 10 weeks.

## Optimal Duration

Customers with the capacity to complete their activities quickly take as little as 9 weeks from purchase to go-live.

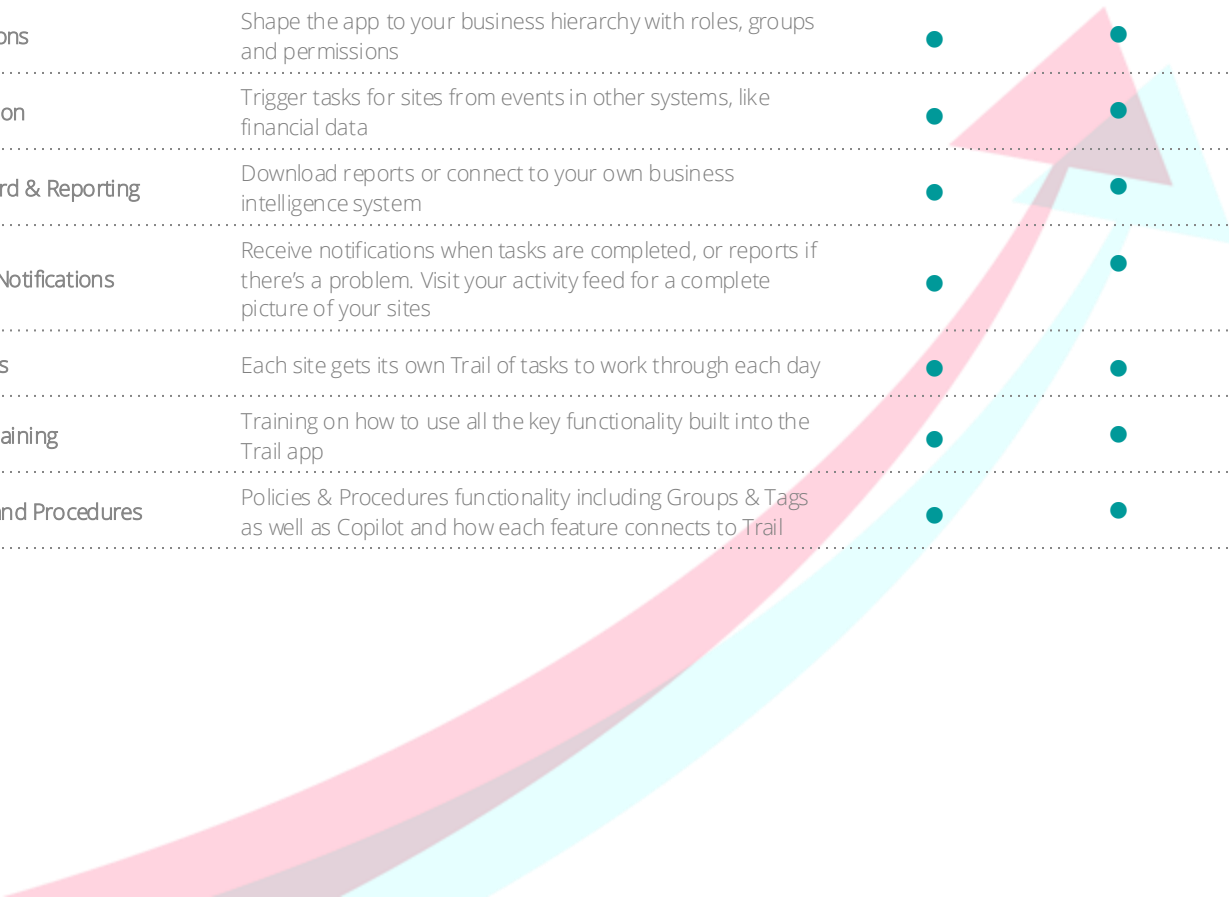
## FlightPath Experience

This is a largely Digital First Experience with Onboarder led sessions. Your Onboarder will deliver training and alongside guidance through in-product tours with live-chat support from our dedicated FlightPath Adoption Team.\*



Each of our FlightPath Packages delivers a tailored set of system functionalities, strategically crafted to align with your business needs and drive impact.

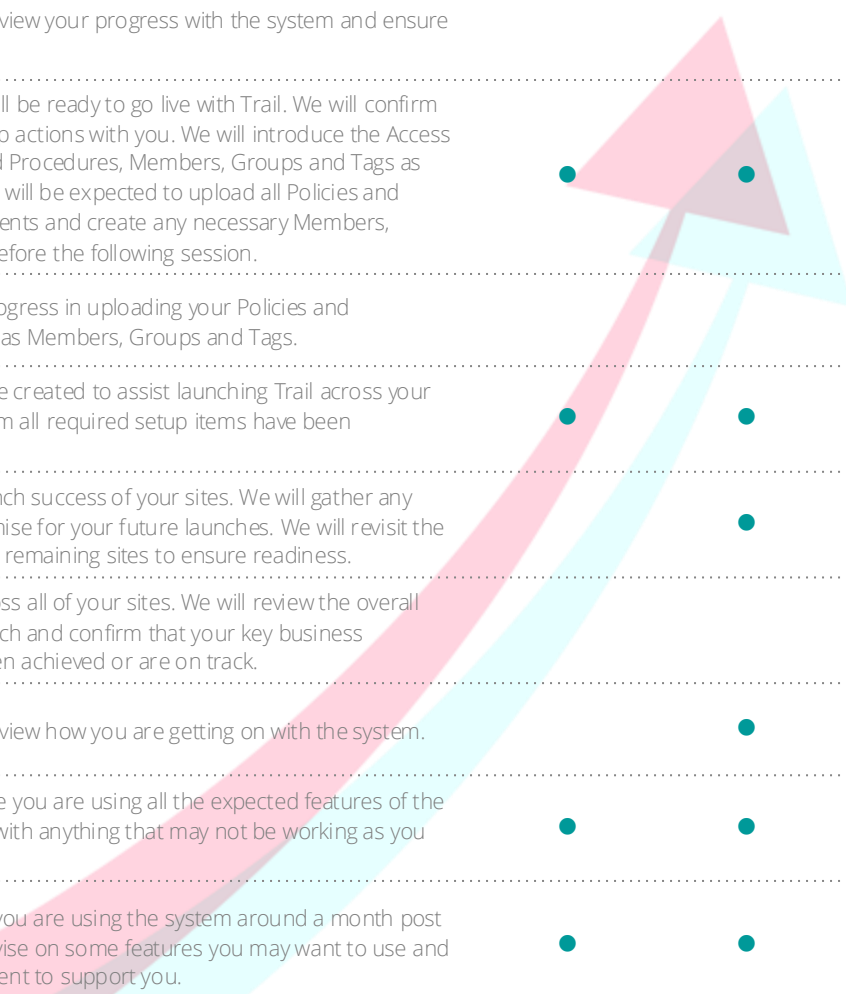
Product features enabled per FlightPath package for Access Trail Evo				
Feature	Summary	FlightPath A	FlightPath B	FlightPath C
Tags & Filters	Focus on the work that matters by hiding tasks for other teams	●	●	●
Search	Find the right task quickly and search through a full history	●	●	●
Adhoc Tasks	Set up and manage ad hoc tasks outside of your schedule	●	●	●
Daily Scores	Each site is given a daily performance score and the results emailed to all	●	●	●
Permissions	Shape the app to your business hierarchy with roles, groups and permissions	●	●	●
Automation	Trigger tasks for sites from events in other systems, like financial data	●	●	●
Dashboard & Reporting	Download reports or connect to your own business intelligence system	●	●	●
Alerts & Notifications	Receive notifications when tasks are completed, or reports if there's a problem. Visit your activity feed for a complete picture of your sites	●	●	●
Checklists	Each site gets its own Trail of tasks to work through each day	●	●	●
In App Training	Training on how to use all the key functionality built into the Trail app	●	●	●
Policies and Procedures	Policies & Procedures functionality including Groups & Tags as well as Copilot and how each feature connects to Trail	●	●	●





Implementation Services included in FlightPath for Access Trail Evo				
Feature	Summary	FlightPath A	FlightPath B	FlightPath C
Welcome Meeting and App Training	The kick off call where we will cover the overall FlightPath and recap your goals. We will guide you through the app with a brief view of Policies and Procedures. You will be shown how to create and setup your sites and tasks which will need to be completed by the following call.	●	●	●
Task Lists and Sites Review Call	This will be focused on reviewing the task lists and sites you have created. We will confirm whether they were setup correctly and answer any questions around them. We will introduce you to User creation and expect you to complete this before the following call.	●	●	●
Continued Engagement Call	A check in call to review your progress with the system and ensure you are on track.			●
Introduction to Trail Evo and Policies & Procedures	At this point, you will be ready to go live with Trail. We will confirm any remaining setup actions with you. We will introduce the Access button, Policies and Procedures, Members, Groups and Tags as well as Copilot. You will be expected to upload all Policies and Procedures documents and create any necessary Members, Groups and Tags before the following session.	●	●	●
Policies & Procedures Review Call	A review of your progress in uploading your Policies and Procedures as well as Members, Groups and Tags.			●
Rollout Planning Call	A rollout plan will be created to assist launching Trail across your sites. We will confirm all required setup items have been completed.	●	●	●
Launch Wrap-up Call	A review of the launch success of your sites. We will gather any feedback and optimise for your future launches. We will revisit the Rollout Plan for the remaining sites to ensure readiness.		●	●
Rollout Review Call	You will be live across all of your sites. We will review the overall success of the launch and confirm that your key business outcomes have been achieved or are on track.			●
Continued Engagement Call	A check in call to review how you are getting on with the system.		●	●
Post Go Live Call	A final call to ensure you are using all the expected features of the software and help with anything that may not be working as you expected.	●	●	●
Adoption and Value Add	We will check how you are using the system around a month post go live and may advise on some features you may want to use and send over Evo content to support you.	●	●	●

Each of our FlightPath Packages offers a curated suite of outcome-driven services, expertly designed to deliver the fastest possible return on investment (ROI).



Alongside our standard FlightPath packages, we offer value-added services provided by our expert consulting teams. Explore how we can further support your success.

### Additional Services Available

Service	Summary
Import Policies & Procedures Documents	Our consultants will take your current policies and procedures documentation and import into the system on your behalf.

