DealRoom

Customer Onboarding Process

Welcome to DealRoom! We’re excited to have you on board. This document outlines our onboarding process to ensure a smooth start, helping you get fully set up, drive adoption across your team, and maximize value from Day 1.

ONBOARDING PROCESS

- **Kick-Off:** During this call, we’ll introduce you to the DealRoom team that will support you throughout onboarding and beyond. We’ll align on top priorities, review roles and responsibilities, and walk through the onboarding steps. Please include future DealRoom administrators and your main points of contact.
- **Process Discovery & Data Requirements:** We’ll import your data (e.g., pipeline trackers, Due Diligence & Integration checklists) and set up your DealRoom environment. Just send us your data, and we’ll handle the rest. See the "Get Started" section below for details on what we need.
- **Reporting Requirements & Review:** Once your DealRoom environment is set up and data imported, we can dive into reporting. DealRoom's BI tool, powered by Google Looker, offers custom reporting with in-house expertise. We provide samples and can replicate your existing reports. This can run concurrently with rollout and training.
- **Rollout & Training:** With your pipeline and template room set up, your environment is ready to roll out! Training is divided into three groups:
    - **Full Platform Administrators:** A deep dive session covering all platform material.
    - **Internal Users:** A dedicated session focused on daily workflows and best practices.
    - **External Parties:** A session similar to User training, as needed
- **Onward:** Once your environment is built, reporting is set, and users are trained, you’re officially onboarded! Your DealRoom CSM will then establish a regular cadence with power admins to gather feedback and share updates on new features.

MAXIMIZE VALUE FROM DAY ONE: KEY ONBOARDING MILESTONES

Our onboarding process is designed to deliver immediate impact, helping your team streamline workflows and get the most out of DealRoom right away. Here are four key milestones that will transform how you execute deals.

- **Data Migration:** Once your pipeline is customized and imported, alongside your new Live Playbook you will truly have a centralized location for all users to see exactly what information they need, when they need it. No more working on multiple trackers or sheets.
- **Automated Reporting:** With your data imported into the platform, our team will then transform it into detailed BI reporting which will automatically update, meaning no longer will folks be waiting on others for ELT or board reports. These can even be delivered to inboxes directly on a preset cadence.
- **Simplified Project Readiness:** Your template room lets you quickly set up new projects with standard diligence and integration lists, permission groups, internal access, and folder structures—reducing administrative work and freeing up time for value-added activities.
- **Live Deal Execution & External Collaboration:** Once a project room is created, you can easily invite external parties, including sellers and deal support. Users can upload data directly to requests, which are automatically sorted and stored securely. Spend less time managing spreadsheet versions—DealRoom handles it for you.

DealRoom

Customer Onboarding Process (Continued)

WHAT CAN YOU PREPARE TO HELP US GET STARTED?

Leverage this list so we can quickly tailor DealRoom to meet your needs. Please provide the following in an Excel format:

Pipeline
- Share your current pipeline as an Excel sheet, including any Custom Fields (or "Deal Details," which are the equivalent of your current Excel columns) you'd like to bring into DealRoom.
- List these fields in the first row and specify the field type (Text, Number, Date, Select, or Multi-Select).
- For Select and Multi-Select fields, provide the dropdown options.

Due Diligence & Integration Checklists
- Provide your current Due Diligence and Integration checklists in Excel or a similar format that can be converted.
- Include task details such as titles, descriptions, categories, status options, and duration (e.g., "This task begins 10 days after close and ends 15 days after close").
- Our team will adapt this to your DealRoom environment.

Reporting
- Share the reports you currently generate, preferably in Excel.
- Excel is best for us to understand your existing calculations for reporting.

FREQUENTLY ASKED QUESTIONS

Q: How long does onboarding take?
A: Onboarding typically takes two to five weeks, provided the required materials are submitted before or immediately after the kick-off. The timeline can be adjusted based on your team's availability and needs.

Q: What will working with our CSM look like?
A: We schedule weekly check-in calls during onboarding. You can contact your CSM anytime, and we'll meet more frequently during the early stages if needed. After onboarding, we typically move to monthly or quarterly check-ins, but our CSM team is always available for additional support.

Q: How does your team help with change management and training?
A: DealRoom provides tailored training based on your pipeline, checklists, and processes. Training sessions will be role-specific (Admins vs Users) and recorded for future reference. We also offer quick-start guides, training videos, and resources to ensure you have everything you need. Additionally, all users (internal and external) have access to our Help Center, including help articles, 24/7 Live Chat, and Email Support.

For a full overview of what to expect during onboarding, check out our **blog here**.