Building the foundation for long-term success

monday.com onboarding services

Tailored onboarding services offer a way for the Provident CRM team to focus your platform training on the most relevant points. With tailored training from our monday.com expert team, you'll be independently and confidently running your work in no time.

The onboarding process

1. Kick-off call

Before onboarding even begins, our team wants to understand your knowledge of the platform, your industry or specific needs, and any crucial goals we should know before diving in.

2. Getting started

Here, we'll work together to build the foundation of your account. This means basic structuring, organising workspaces and folders, setting up your first use case, and laying the groundwork for how you and your team will use monday.com.

3. Train the trainers

Up until this point, only those working closely with the monday.com team have been trained on the platform. But, in order to get the full value, we believe everyone on the team should be trained and comfortable working on monday.com. At this stage, we include additional team members in some of the training sessions.

4. Roll out

Now that we have the base of the account established, we like to build on top of it with automations, integrations, and different views to make your workflow easier. Once the additions have been reviewed, we will start rolling it out to the rest of your account.

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1 Tailored team training

Explore the capabilities that are most relevant for you. Gain a deeper understanding of permissions and notifications. Learn about building forms, creating dashboards, using automations and formulas, and the more advanced building blocks needed to build robust workflows.

2 Business process optimisation

Discover what makes a good board - including views and widgets that can improve how you work.

3 Automating your workflow and integrate with other tools

We'll help you connect monday.com with the tools you already use, and automate routine tasks, so you can streamline processes end-to-end.

4 Reporting configuration

Learn how to leverage formulas, dashboards, chart view, pivot tables, and more.

5 Account structuring

Establish secure account settings, insights, and user permissions so your account can scale efficiently and data is always protected.

6 How to onboard your team

Learn from our CSMs' tried and tested methodology for successful adoption. Learn best practices and leave with a tailored onboarding plan including resources.

Our experts are here to help you succeed!

Our Professional Services team provides the following consultation to accelerate business results:

Extended onboarding

Get additional hours of training to boost adoption, enhance your current workflows, or enjoy tailored training for different stakeholders.

Project consultancy

Get an expert's help on structuring complex workflows, as well as guiding organisational change to fruition.

Technical services

Get connected to the resources you need to build a custom integration through monday apps or implement a native integration to 3rd party platforms.

Trusted by 125,000 customers worldwide

Best Support LEADER SPRING 2021

Easiest Setup MID-Market SPRING 2021

Most Implementable SPRING 2021

Highest User Adoption SPRING 2021

Best Usability SPRING 2021

Discover what else is possible with monday.com

GET IN TOUCH

ISO 27001 CERTIFICATION EUROPE™