

RHUMBIX ONBOARDING OVERVIEW

Building a true partnership focused on your team's success

Rhumbix follows a four-step process to lead you through onboarding.
This process takes five weeks on average

Plan

Prepare for successful onboarding

- **Confirm Goals** so we drive toward the same outcomes
- **Appoint Implementation Leads** based on their area of expertise
- **Set Timelines** to keep the deployment on track
- **Resources needed:** Define Field, Operations & Payroll contacts
- **Time required:** 1-2 hrs of initial meeting and some email follow-up

Configure

Setup Rhumbix to match your workflows

- **Configure** platform to meet operational & payroll needs
- **Review** forms and workflows requirements
- **Upload** project, budget and employees to Rhumbix
- **Check-in** weekly during configuration and verification
- **Resources needed:** Project, Equipment, Employee & Materials data from your system along with upload formats to your ERP
- **Time required:** 1-2 hours to gather the data, 30-minute weekly check-in call

Verify

Confirm and optimize Your Rhumbix setup

- **Initial project deployments** with 1-3 projects to validate Rhumbix setup
- **Verify** configuration works with existing & planned workflows
- **Adjust** workflows based on any feedback or opportunities for improvement
- **Resources needed:** Access to project teams for training & process verification
- **Time required:** Hour long screenshare training, 30-minute weekly check-in

Deploy

Get your entire company on Rhumbix

- **Train Trainers** to become Rhumbix experts
- **Continued progress review** to ensure deployment success and long-term success of your organization
- **Resources needed:** Operations & Payroll involvement for full deployment
- **Time required:** 30-minute weekly check-ins first four weeks