

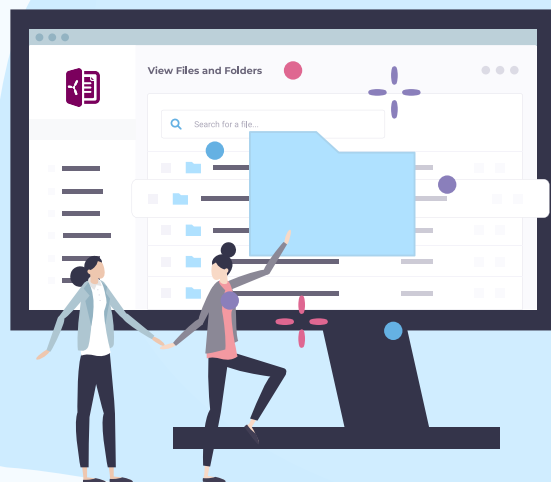
# How SmartVault Makes Your Tech Vendor Switch as Efficient as Possible For Both You and Your Clients

Whenever you change or adopt new technology, it's important for you to feel that your technology vendor is there to support you and that you have someone to lean on when you run into difficulties or have urgent questions to be answered. SmartVault is here for you.

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## 1:1 Product Onboarding Sessions

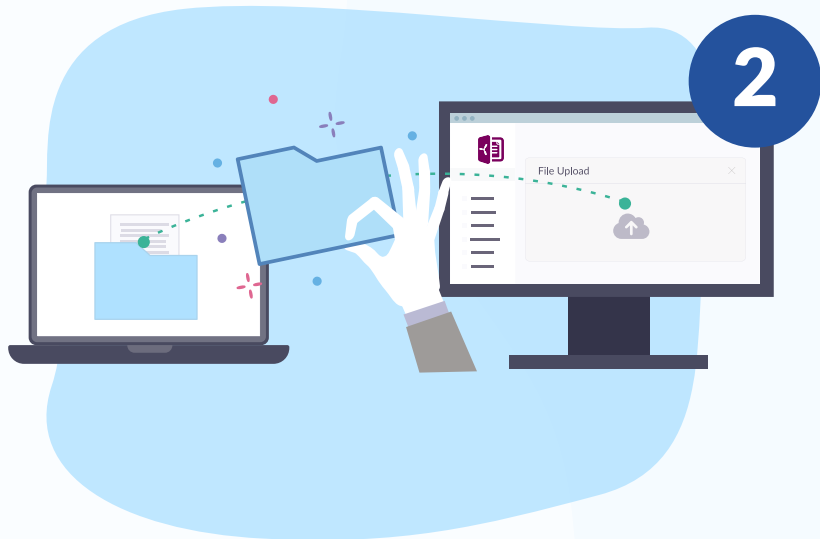
Our onboarding sessions are designed to get your account, folder templates and workflow set up as you need it, with 1:1 help from your dedicated Customer Onboarding Manager.



## 2

## Migration Options

Do you have documents you want importing into SmartVault, either from another document management platform or from your own desktop or hard drives? No problem. Our migration team can offer you a white-gloved service or guide you on how to migrate your own documents into SmartVault.

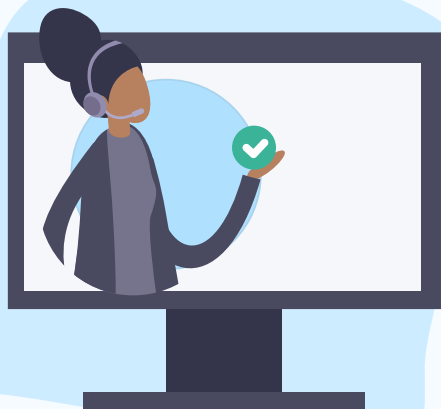


### 3

## Team Training Sessions

Have multiple team members that will be using SmartVault? Arrange a team training session with your Onboarding Manager to ensure they are up-to-speed with exactly how they upload, download and process documents via SmartVault.





## 4

### Smart Hours

Been a customer with us for a while but want a refresher or help reconfiguring your set-up? Book a completely flexible session with a Customer Success Manager tailored to your exact requirements.

# 5

## Client Guide and Training for Your Customers

Although our client portal is designed to be user-friendly, we appreciate some of your clients may need extra help or guidance when accessing, uploading or eSigning their documents. Our client how-to guides and videos will allow them to be up-to-speed in no time.





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## SmartVault Training Academy

Prefer to learn at your own pace? Want help with a specific feature? Use our self-serve Training Academy, packed with how-to guides, videos and tips on how to use SmartVault most effectively.

# 7

## Local Technical Support Team and Instant Messaging

OK, so no matter how long you've been using SmartVault, we know sometimes issues can arise. Call our US-based support team to help with any issues quickly and easily, or if you'd prefer, use our instant messaging feature on our website if you don't want to use the phone.





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## Customer Webinar Series

NEW! Join one of our customer webinars as we explore topics that range from our latest Request Docs feature to best practices for inviting clients to your portal.