



2018 Premier Onboarding Overview

The Premier membership program was officially launched by Print Audit on February 1, 2012. The Software as a Service model (SaaS) business model included a number of Print Audit products under a subscription service. Today the program has grown from a comprehensive toolset to also include a sales, technical training and consultation program. In 2018, Print Audit set out on a mission to save the Office Equipment Industry. The company created initiatives such as Seat Based Billing model consulting programs, data analytic and strategic planning sessions which made Print Audit services extend far beyond software tool sets. Part of this new mission was provide additional programs and features similar to its Premier membership plan. NeoStream (a Document Management company acquired by Print Audit 2017), has now established a similar subscription program that can be added to an office equipment dealer's current Premier program. Print Audit's new vision is to further add subscription based offerings to assist dealers with offsetting declining revenues due to lower device profits and declining print volumes.

The Print Audit Premier program is managed by a team of dedicated technical and sales training staff members who are co-ordinated by a Customer Success Manager. Print Audit has built a comprehensive onboarding plan to ensure an office equipment dealer has every opportunity to build recurring revenue by offering Print Audit tools to their customer base.

Team Role and Responsibilities

Customer Success Manager:

Overall account coordination and on-going support.

Opportunity Development:

The Customer Success Manager (CSM) will work with members of your sales organization to help develop sales opportunities to close business. This process includes availability and support for joint web presentations and conference calls with prospects and customers utilizing reporting and analytical tools to assist in the sales process, assistance with RFP responses and security documentation as required by customers.



Periodic Review and Feedback:

The Customer Success Manager will schedule quarterly business reviews with all support individuals, professional services, administration, and sales development staff. Premier Member support that is needed going forward will be scheduled accordingly.

Infinite Device Management Design and Implementation:

Once your staff has completed the CBT and begins to use IDM, your CSM will coordinate an ongoing webinar series to ensure that you have subject matter experts around IDM.

Professional Services

Infinite Device Management Computer Based Training:

The CBT is a self-paced training program designed to technically certify your staff on the use of Infinite Device Management. Each person registered will have up to 30 days to complete the 4 hour course.

Technical Certification Scheduled:

Print Audit's Installation and Technical Training Services (I.T.S.) team will enable your technical staff to be completely self sufficient with the installation of Print Audit's tools. The I.T.S. team will also provide real time support for the installation of user based tools. A two day onsite technical training course will be scheduled, if possible, within 30 days of the Print Audit Premier partnership being finalized.

Installation and Deployment Assistance:

In order to further complete technical competency and assurance of successful deployment with Print Audit solutions after initial Technical Certifications are complete, the Premier Program includes on-going customer deployment support and consultation. Site survey and product installation requirement specifications are available to ensure that customers have the required infrastructure ready and understand the process. I.T.S. staff will be available to provide consultation prior to commencing an installation, ensuring that your staff's time will be minimized. To support initial installations after certification training has been completed (and for complex implementations), the I.T.S. team will be available on a pre-scheduled basis to remotely assist your technical staff.



Sales Development

Initial Sales Organization Training (Management, Sales Representatives, MPS):

Through a combination of web sessions and on-site meetings designed to increase their knowledge and equip your sales team with the skills needed to position and sell all of the Print Audit products (Infinite User Management, Infinite Device management, Print Audit Insight).

Premier Member Glossary of Terms

Premier Portal

The Premier Portal is a primary destination for management and technical staff to issue or revoke licenses of the user management and embedded software built by Print Audit. The portal also includes a dedicated resources tab that includes a majority of documentation Print Audit offers to Premier members.

Infinite Device Management (IDM)

IDM is designed to remotely collect meter reads, automate supply fulfillment and report service information for managing fleets of printers & multifunction devices. It features the most sophisticated supplies and service alerting in the industry, can automatically collect meter reading & cost information and allows you to easily export data into third party accounting systems.

Insight Portal

Insight is a business intelligence tool that gives Premier members access to powerful, interactive dashboards. While traditional reporting tools only give you a 2-Dimensional view of printer data, Insight enables Premier members to dig deep into Device, User and Document data with powerful drill-down capabilities.

Infinite User Management (IUM)

Print Audit's next generation print user management solution, providing intelligent print and copy management is built specifically for the commercial and office market, that reduce the cost of document output, increases document security, and provides flexible cost recovery methods.

Unlike other print management solutions, IUM is architected as a client-based solution, supporting a variety of print workflows and user authentication methods,



IUM's client-based architecture is the first step in capturing 100% of all printing information. Installed on the workstation, where the print job originates, IUM automatically captures all print job information, including all activity performed by locally-connected printers. Being client-based, IUM eliminates concerns with the cost, reliability, maintenance, or intrusion of a print server-dependent application.

Provides a detailed audit trail of all documents created at MFDs.

Reduces wasted printing

Provides proper allocation and recovery of all document output costs.

Provides document security

Improves document creation workflows

Contributes to the "green" initiatives being undertaken by environmentally aware organizations

Decreases organizations expenditures

Optimizes the use of the fleet

To analyze printing in an organization, IUM gathers all printing information and stores it in the central database. Reports can then be run with the collected data to identify high-volume printers, peak printing times and highest volume users.

IUM can significantly reduce printing costs by enforcing how printers are used. Administrators can enforce printing in duplex mode and control which printers are allowed to print in color, and even control the size of job that a printer can print. Automatic notifications can be sent to users printing from their workstations, informing them of the cost of their print request, and either suggest a lower cost alternative, or deny the job altogether

A highly configurable client can also be implemented to help recover printing costs. The client provides users a method to easily enter charging information to assign printing costs to specific cost centers or projects.

IUM can be licensed in Analysis Mode, or as a full suite.



Embedded

Print Audit Embedded installs directly onto supported Ricoh, Sharp, Kyocera, Lexmark, Xerox and HP multifunction devices, allowing users to control and recover all printing, copying, faxing and scanning costs. Embedded provides a complete document tracking, chargeback, secure release and pull printing solution that eliminates the need for external hardware.

Additional Programs

NeoStream

NeoStream is a software company that provides document management, communication and collaboration solutions to connect and align the information and communication flow within and between organizations. NeoStream's new PlacePoint Prime program allows office equipment dealers, VARS and Managed IT providers to win more document management deals and generate additional revenue streams.

Seat Based Billing Mentorship Program

The world of Managed Print is changing at lightning speed. Office imaging dealers understand that something must be done to adapt to pressures from a variety of sources that are driving flat page growth and price pressure on Cost Per Page (CPP) revenues. As pages decline so do revenues. And with lower margin on CPP every year, the importance of adaptation becomes clear. One solution that could remedy the negative impacts of both price pressure and declining pages is Seat Based Billing (SBB). Print Audit now offers a comprehensive mentorship program to assist dealers to move towards this business Model.



Onboarding Plan

The onboarding plan is structured in 3 stages. Each stage is designed to ensure that the Premier member has the confidence to be a self sufficient.

Stage 1

Initial Activities Meeting. Transition and on boarding consists of phone calls and email communications with stakeholders to address and complete the following;

- Gather additional information on Member account (ie. MIF, other association,, key initiatives, etc.)
- Discuss device monitoring strategy introduction to Transition
- Schedule sales strategy development meeting
- Pricing discussion re: management tools and recurring revenue
- Provide access to Premier Portal and NFR's for all tools
- Arrangements for Technical Training Link to Technical Training Plan
- Gather marketing dept. requirements re: News release, Branded Marketing materials, RAK's etc.
- Premier member Org structure assignment (Key Contacts; Sales,MPS, Service, Training, etc)

Stage 2

- CSM - Premier Member Review
- Opportunity pipeline discussions and review
- Follow up on transition of device monitoring project
- Establish stage 2 of sales training
- Professional services assistance with end user installations
- Invitation to roundtable discussions series
- Review collected data on IDM via Insight.
- Review IUM data collected via Insight

Stage 3

- CSM - Premier Member Review
- Establish Stage 3 of Sales Training (Continuing Education)
- Opportunity hunting and prospecting activity plan for net new customer
- Setup technical follow up training (Continuing Education)
- Insight - IDM review