

“Path to Success” Packages

Our "Path to Success" programs are customized specifically to make your project management implementation and ongoing use a success.

Paired with an experienced Easy Projects Success Coach, you and your team will be provided **one-on-one assistance** to configure your account, set up your first project(s), to import and map your existing data, to train your team, and much more. All this will be completed typically within three to four weeks of your purchase to ensure you quickly achieve ROI and your team is fully engaged using Easy Projects.

“Path to Success” is so much more than just product training. Your Success Coach will spend the time to **learn your business processes, to identify key challenges and to suggest the best ways to improve** your team's efficiency. He/she will apply both industry best practices as well as insights and learnings from our other clients to “sew” Easy Projects in to your workflows. We outline the steps and the expected achievements/timing/results of our setup, onboarding, and training efforts.

The Pillars

“I highly recommend Path to Success...with everything that else that we had going on, our Success Coach made getting started that much easier!”

Laura Goldstein, Director of Marketing, Lowes Foods

Kickoff Meeting

We'll need to get to know more about you to align our platform's capabilities to your specific intent. We'll strive to learn your workflows, processes and desired goals to craft an implementation and training plan developed specifically for you. It will include target timeframes, milestones and outcomes.

Live Setup Meeting

Now the rubber hits the road! We'll action your customized plan and start to implement it in Easy Projects. We'll setup your users, establish their permissions, create custom fields, design your views, configure your executive dashboards and so much more. Through this process, you'll learn how simple it is to do so you can easily make changes yourself as you grow.

Project Setup

Your first project is on us (maybe more than one)! Your Success Coach will work with you to identify a critical project and lead you through the best practices for creating and managing it in Easy Projects. We'll cover the ins and outs you'll need to have the biggest impact on your bottom line.

Data Import

If you've got critical legacy data, we've got you covered there too. We will map and import your existing data to ensure you experience seamless business continuity. We can import projects, activities, time logs, users and customers natively from either Excel or Microsoft Project.

Personalized Training

Once Easy Projects is configured for you, we'll teach you how to get the most out of it. We'll tailor and deliver custom, interactive training sessions for your project managers, team members, trainers and executives to ensure adoption and immediate ROI. You can choose from our extensive training catalogue or work with us to create a personalized training program.



“Path to Success” Comparisons:

Easy Projects Components	Essential	Standard	Advanced	Ultimate
Price (\$US)	\$990	\$2900	\$6900	\$9900*
Number of User subscriptions (minimum package required)	1 – 19	20 – 49	50 – 99	100 +
Kickoff Meeting	✓	✓	✓	✓
Live Setup Meeting	✓	✓	✓	✓
Project Setup (number of projects)	1	2	4	6
Data Import (types of data)	1	3	All	All
Personalized Training (number of hours)	2	6	8	12
Recorded Training Sessions Video recordings of your personalized training sessions are provided for sharing and future reference. This is especially valuable for fast growing organizations, those with high employee turnover, or those that utilize a learning management system.	✗	✓	✓	✓
Business Analyst Consultation (number of hours) Throughout our onboarding, we aim not merely to replicate your existing business processes in Easy Projects, but rather to improve them before mapping them in our tool. Areas of consideration include Key Performance Indicators, functional and nonfunctional requirements identification, business case creation, process re-engineering, and more. Ultimately, we aim to “sew” Easy Projects into your business!	✗	1	2	4
Performance Benchmarking To gauge and measure both performance and payback, we determine and record initial metrics to establish a baseline starting point against which key Easy Projects reports can be compared. Key elements typically include: financials such as project budget, costs, expenses, revenue and profit; employee/resource utilization; project planning and timelines; and our Customer Health Index (CHI).	✗	✗	✓	✓
New User Onboarding (up to two times after initial session) Large or dynamic companies often require training above and beyond their initial phase to onboard new team members. Your Success Coach will develop an annual program to facilitate new user training and engagement.	✗	✗	✓	✓
Custom Integration For those customers who desire to integrate our platform (through one of our various integration options) to another software tool, our Business Analyst will work with you to define, determine, and document the development effort for costing and completion.	✗	✗	✗	✓

* minimum cost