



Allocate Customer Success

Let us guide you every step of the way

The Allocate Customer Success programme helps you define and deliver your workforce goals by making the most of your technology investment.



ACTION-BASED METHODOLOGY

We develop a success plan with you, with clear ownership, actions and dates. The plan is broken down into manageable steps, with regular activities. The plan is reviewed regularly to reflect current priorities.



ROOTED IN DATA AND EXPERTISE

System metrics and data are central to your Customer Success journey. We will guide you through what data is important and why. Proactive monitoring will highlight when metrics fall behind thresholds or achieve milestones.



TAILORED TO YOUR ORGANISATION'S NEEDS

We know that one size does not fit all. Workforce goals are specific to each organisation. That is why we focus on what matters to you. Your plans are also geared to reflect your organisation's maturity from new users of the technology through to expert level users.



SHARED LEARNING AND EXPERIENCE

We bring learning from hundreds of organisations to you and your team to support your decision making. Each step of your journey is an opportunity to reflect, learn and apply those learnings more widely in your organisation.



MEASURABLE IMPACT

Success criteria are agreed for each phase of your plan, so that success can be evidenced. By continuing to measure the impact and apply learning throughout your Customer Success journey, benefits can be sustained long-term.



PART OF YOUR TEAM

All Optima customers can start on their Customer Success journey, supported by remote monitoring and a named customer success analyst who will guide them every step of the way.

"Our experience of the Customer Success Pathway Programme has been really good. We're working on an area that is high priority for us and working with Allocate in this way keeps the activity required on our radar. We have clear actions and the work is being broken down into bite-size chunks which makes it manageable."

Michelle Hope, Assistant Chief Nurse, North Middlesex University Hospital NHS Trust

START YOUR CUSTOMER SUCCESS JOURNEY NOW

For more information please contact your Allocate Customer Success Analyst or visit www.allocatesoftware.co.uk/customer-success/

 **ALLOCATE**

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1. Will we still have face to face meetings with our Customer Success Analyst?

Yes, although these will mostly be at the time where we are discussing the next 6 months objectives and reviewing the past 6 months.

2. Is this new model a reduction in service?

On the contrary. This model focuses on delivering results. Reflecting on our previous delivery we found that customers sometimes found it hard to dedicate a significant amount of time to meeting with their CSA and due to the breadth of topics covered progress following the meetings wasn't always achieved. With this model, there is potential that you will be speaking to us on a weekly basis, with a focus on delivering a key area of work.

3. We don't have time to focus on new activity.

We have a step that encourages teams to look at the activity they are involved in and assess whether they are working in the most effective way. Our stones of activity have been written with the aim of taking no more than 2 hours to complete by our customers in recognition of the need to maintain business as usual. That small amount of dedicated time will quickly build up to evidencing progress and having good foundations of policies and processes as well as system configuration to build upon.

4. We have tried to introduce new ideas before but haven't been able to get the engagement or sustain the change

We recognise that many of the workforce improvements will require a change programme to support it. We will make suggestions of the roles that may benefit from attending the steps in order to deliver the change.

5. How many steps will I be able to work on at a time?

This will be discussed at your Success Planning meeting where your objectives are agreed. We will plan that a team in an organisation is only working on one step at a time, but where there are more than one team, for example safer staffing, bank or medical planning teams more than one step could be scheduled.

6. I am very advanced in my use of the systems and don't believe I'll get any benefit from Customer Success

Customer Success within Allocate is broader than the service that is visibly delivered by the Customer Success Analysts. Where there are new directions or areas of focus, we may create a collaborative of a few organisations to share the learning from both a system and organisational perspective. Product Managers will also be leading sessions on both a 1-1 and group basis for our most advanced users to support the future direction of our products.

"We're finding the Customer Success Programme really useful, we're having regular check-ins, the supporting information we're receiving from Allocate has been great and it's keeping us on track."

Patricia Levy, Head of Workforce Information Systems and Temporary Staffing, North Middlesex University Hospital NHS Trust

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