



## Accelerating Success

### YOU DESERVE A PEACE OF MIND

#### ● TECHNOLOGY IS NOT ENOUGH

You know you must transform your contracts generation and signing, but how do you start? How do you solve the whole problem, not just waste time and money on the latest technology?

#### ● KNOW WHERE TO BEGIN

Ask the right questions to learn what you need to change, how you can enlist your staff for the new plan, and how to support them as they transform your company.

#### ● KNOW HOW YOU'LL WIN

Create a roadmap to outline the operational changes, efficiencies you'll get, how you'll measure success, and how you'll train your staff to use the new contracting processes to accelerate addressing your customer's needs.

It's understandable that you don't trust consulting or technology firms to solve your whole problem.

Many focus just on their piece of technology and offer no turn-key solutions, nor even recommendations on how to solve the whole problem.

Solving your contracting and signing needs shouldn't just include a piece of technology or a tool.

It should include all the systems, the personnel, the processes, the development, training and the maintenance necessary to address all your customers' and staff's needs.

We help you ask the right questions and use best practices for improving your contracts and signing needs.

As a result, you'll build a plan for your **specific business to not only choose the right technology but also ensure the success of your staff to transform your daily operations around contracts generation and signing.**

### 3 Simple Steps to Roadmapping

Your time is of great value.

Our goal is to efficiently and quickly create your roadmap and change management plan.

# Program Acceleration Roadmapping (PAR) Data Sheet

Before meeting your assigned ValTeo team, our staff will review your needs internally with them and set up an introductory, remote call with you and your staff.

During this introductory call, we'll review what we learned about your needs and provide an overview of the

### 3 Simple Steps to Building Your Roadmap:

1. Kickoff & Review Requirements
2. Design & Develop Plan
3. Review & Deliver Plan

## Typical Timeline

This package timeline is flexible to accommodate your availability. Typically, your team will be assigned within a week from purchase and the plan delivered within one to two weeks after their assessment meeting with you.

## Our Promise to You

...is to deliver a roadmap plan with immediate value:

- You'll have a team of business optimization experts working to assess your needs & recommend a turn-key solution
- Once delivered, you'll have a prioritized list of a list of business processes to improve, with the top 3 earmarked to tackle right away
- You'll know what metrics to use to baseline and track your success
- You'll have a plan that includes strategies for the technology design, the personnel training, support plan and artifacts to ensure adoption and full value realization
- You'll be well informed of all design options, market Best Practices, and decision tradeoffs
- You'll be fully informed of the plan development progress throughout
- You'll have complete access to your assigned team of experts to address any questions about the plan not just during but also after it's delivery

## Deliverables

- **Onsite Solution Design & E-delivery that Includes**
  - The top three use case designs
  - The recommended technology platform
  - Initial Change Management Plan
- **Written Business Adoption Acceleration Plan (BAAP) that includes**
  - Use case implementation roadmap based on key metrics calculations
  - Recommended training, support rigor, curriculum and infrastructure
  - Recommended release marketing / announcements

## Price

\$19,298 (Flat Fee, Fixed Price). Travel and related expenses will be in addition to these fees and billed separately.

*"With the focus brought in understanding our specific needs, we were able to receive not only a customized plan that applied industry best practices for our use case, but also develop an eSignature solution that meant documents which used to take weeks to complete, would be fully executed in hours!"*

Laura G., Vice President, Customer Transition  
Financial Services & Wealth Management

*"We received solid guidance and support as we presented challenging business requirements in re-configuring multiple enterprise processes. Through the engagement we learned how to evaluate our digital options and deploy into production. We cannot emphasize enough how much we value not only the support we received but also the tremendous efficiencies and process improvements the team helped us build."*

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