

ONBOARDING PROCESS

PRE-CONTRACT POST-CONTRACT ONBOARDING

Intro Call (30 mins)

· What is Giving Place?

- Discovery Call (~1 hr)
- Current charitable capabilites, activity, process and challenges
- NDA

2

- 3 Free Trial / Proof
- · Prospective client provides:
 - Sample of charitable giving history in any accessible form: xlsx, pdf, GL-extract, .csv, etc.
- · Giving Place provides:
 - Demo account with client history loaded, cleaned and reconciled.
 - Initial insights from past giving
 - "Day in the life" Demo: Giving with Giving Place

4 New Customer Onboarding / Implemenation:

Free

5

- Typically ~ 1 week with periodic check-ins over email/zoom
- · Customer provides:
 - Remaining charitable history, documents, pledge/grant agreements, etc.
- · Giving Place provides:
 - All user and system configuration and personalization.
 - Link checking account(s) to Giving Place for grant-execution

Activate Account and Distribute User and Family Logins

ONGOING SUPPORT

6

Onboarding + beyond support

- 1:1 support to configure and execute initial grants within Giving Place
 Ad-hoc training or zoom support on demand
- Ongoing check-ins, full support throughout year
- · In-app help and tutorials
- · Support desk/email