# CUSTOMER ONBOARDING & TRAINING

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INTRODUCTION

Your partnership with Greenlight Guru begins before you even log into the platform for the first time! In fact, since day one of our relationship, we have been listening to your company's needs, current challenges, and future goals. Our Customer Success team has developed a proven onboarding and training program to ensure that you meet those goals and achieve maximum value from the software.

WE ARE MORE THAN A SUPPORT TEAM, WE ARE YOUR CUSTOMER SUCCESS TEAM.

Our Customer Success team is here to do more than simply address platform questions. We are here to help you achieve workflow efficiencies, increase team collaboration, maintain compliance, and get your product to market quickly and safely. Your outcomes shape our outcomes – when you succeed, so do we.
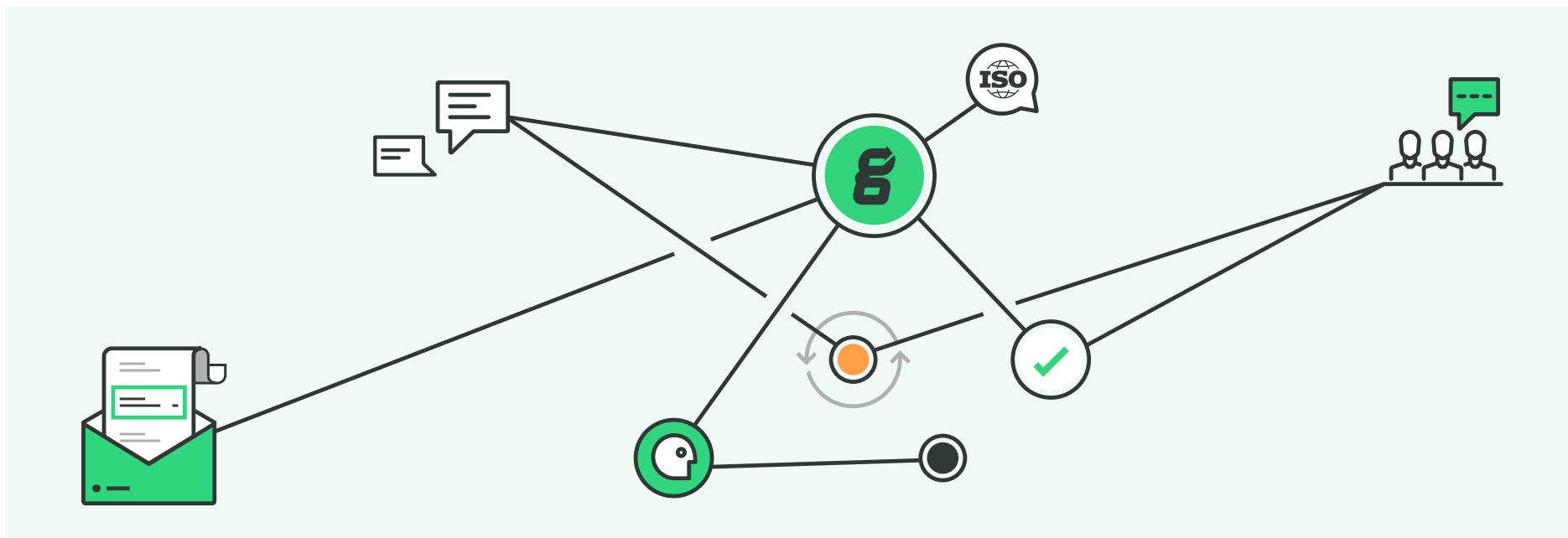
OUR COMMITMENT TO YOU:

- ✓ Workspace-specific training sessions to get your users onboarded quickly

- ✓ Support via email, live calls, and our in-app Help Center

- ✓ Ongoing training, product webinars, and additional content to further enable you after the initial onboarding

- ✓ Best practices, tips and tricks to maximize your usage and experience with the software

- ✓ Updates and content to keep you educated and in compliance with the ever-evolving global and market-specific industry regulations

- ✓ Robust educational courses, how-to guides, and validation resources in our Help Center and through Greenlight Guru Academy

- ✓ In-house expertise to help you reach important milestones throughout your medical device journey

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OUR TEAM

OUR MULTIFACETED TEAM OF CUSTOMER SUCCESS PROFESSIONALS, INDUSTRY EXPERTS, TRAINING SPECIALISTS AND SUPPORT PERSONNEL IS HERE TO ACCOMMODATE THE VARIOUS NEEDS OF EACH CUSTOMER.

We pride ourselves on being use-case driven and providing fanatical support. Medical device companies come to Greenlight Guru at many different stages of their commercialization journey, and we are well equipped to handle each.

To ensure you reach your desired goals and outcomes with Greenlight Guru, you are paired with a dedicated Customer Success Manager that learns more about your organization and serves as your main point of contact.
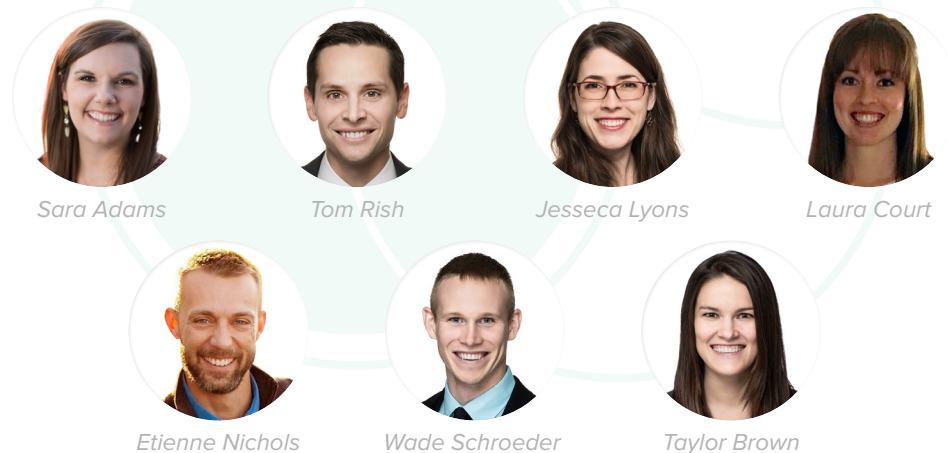
GREENLIGHT GURU
RANKED #1 QMS

RANKED #1 IN QUALITY
OF SUPPORT

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THE GURU EDGE:

One of Greenlight Guru's key differentiators is that we have a team of Medical Device Gurus to help you through your commercialization journey.

These former engineers and quality professionals understand your challenges, and they have helped hundreds of medical device companies bring products to market. Our Gurus can provide clarity around industry best practices and regulations, along with software tips and tricks, at every stage of the process.

Sara Adams   *Tom Rish*   *Jesseca Lyons*   *Laura Court*

Etienne Nichols   *Wade Schroeder*   *Taylor Brown*

Here is what our Guru Team can help you accomplish:

1   QUALITY ASSURANCE

- ✓ Quality system design and implementation recommendations.
- ✓ Quality documentation review.
- ✓ Quality event support.
- ✓ Defining CAPA & Complaints.

2   PRODUCT DEVELOPMENT

- ✓ DHF / Technical File evaluation.
- ✓ Design control coaching and best practices.
- ✓ Risk management support and consulting.

3   REGULATORY COMPLIANCE

- ✓ Regulatory strategy and planning.
- ✓ Product submission review.
- ✓ Audit preparation and practice.

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OUR TEAM'S COLLECTIVE EXPERIENCE IN THE MEDICAL DEVICE INDUSTRY INCLUDES:

- Extensive experience in medical device product development from small start-ups to Fortune 500 at various types of companies (OEMs, contract manufacturers, etc.).

- Implementing scalable, right-sized processes with 100s of companies to keep product development, quality, and regulatory in proper balance.

- Maintaining QMS readiness for ISO 13485:2016 certification (other market certifications).

- ISO 13485 Lead Auditor experience.

- Significant product development experience from initial concept through manufacturing and supply chain, including achieving 60601certification.

495
processes validated

30
ISO certifications

65
FDA & ISO audits
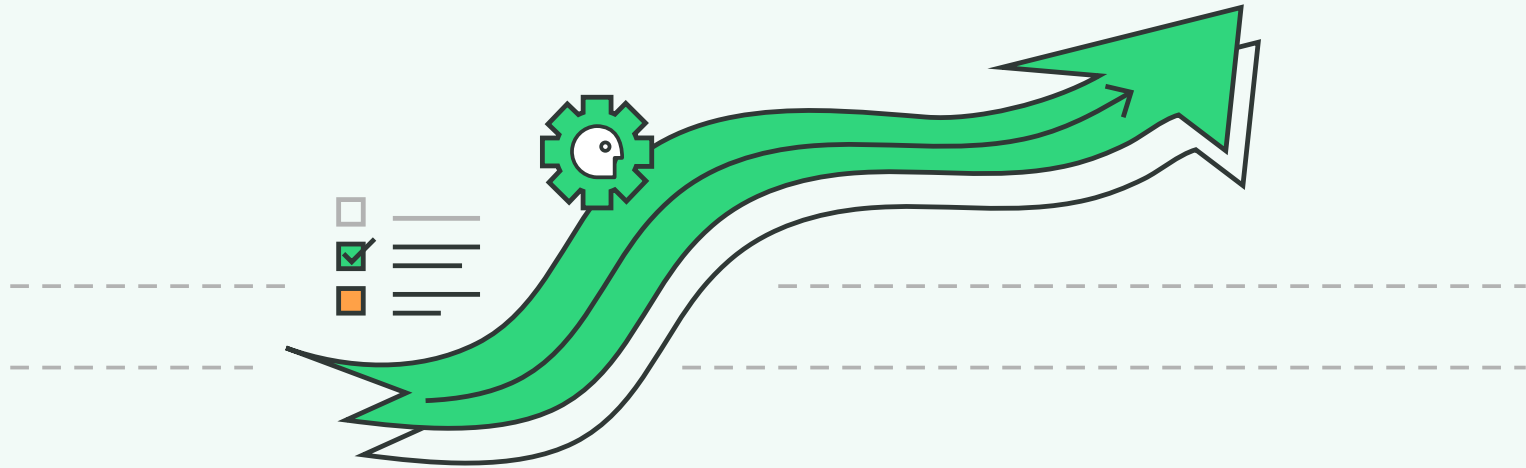
295
medical devices launched

1100
SOP's authorized

71
QMS Implementations/ Migrations

"

WITH GREENLIGHT GURU, YOU'VE GOT SOFTWARE, BUT ALSO WHAT AMOUNTS TO A PERSONAL CONSULTANT. THOSE CONNECTIONS ARE POWERFUL.

"

Lynsie Thomason,
Quality and Regulatory Lead at Innovere

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ONBOARDING OBJECTIVES

You are partnering with Greenlight Guru for a reason and it's our job to understand your why.

We strive to get to know your team and put a plan in place to ensure you achieve your goals on time. Defining success for your company will enable us to design a collaborative action plan for your first 60 days and beyond.

Our team will work with you to better understand the current processes in place, define the objectives you have for Greenlight Guru, and to create an action plan for adopting the platform. We are committed to meeting your team where they are, whether you are bringing your first medical device to market or looking to advance and scale quality at your company.

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OUR ONBOARDING PROGRAM IS DESIGNED TO GIVE YOU THE TRAINING AND CONFIDENCE NEEDED TO MIGRATE TO YOUR LIVE, AUDITABLE PRODUCTION ENVIRONMENT IN UNDER 60 DAYS.
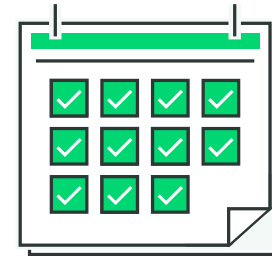
In the first 60 days with Greenlight Guru, you will:

1 Complete the training courses and calls prescribed in our onboarding program.

2 Architect your QMS based on existing and new processes and procedures.

3 Migrate to your fully auditable production environment and have users actively working within it.

> "THE GREENLIGHT GURU TEAM GOES OUT OF THEIR WAY TO HELP US MEET OUR BUSINESS OBJECTIVES. THEY ARE KNOWLEDGEABLE IN THE REGULATORY AND QUALITY MANAGEMENT SPACE AND WORK WITH US TO ENSURE WE ARE BUILDING OUR QMS THE RIGHT WAY."
>
> *Ryan Shelton,*
> *CEO, PhotoniCare*

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GETTING STARTED

Once we make our partnership official, *Greenlight Guru's Customer Success Team* immediately begins provisioning your test account and extends a welcoming hand to initiate your onboarding experience.

All we need is your participation as we collaborate to implement the software. Customers that dedicate themselves to this process begin deriving value immediately and avoid downstream challenges such as prolonged implementation times or friction in adoption and use.
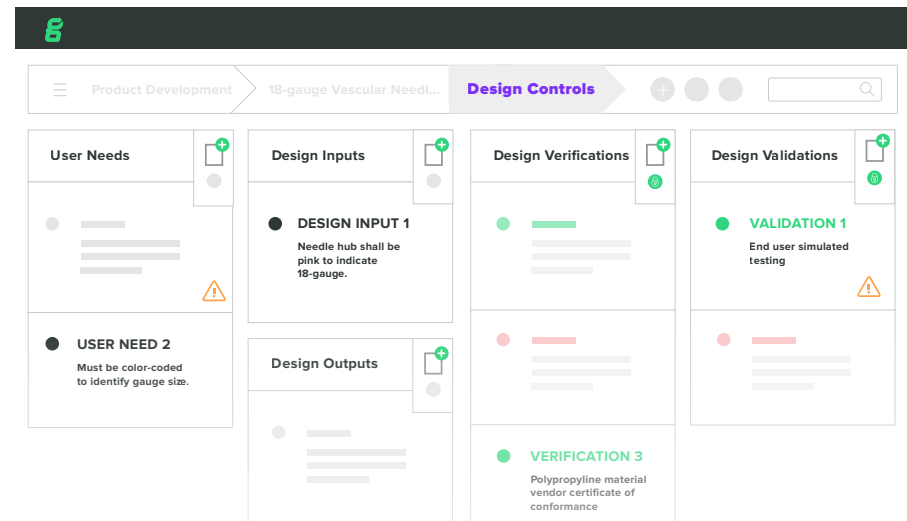
HERE ARE THE ACTION ITEMS FOR GETTING YOU STARTED WITH GREENLIGHT GURU:

1 Activate Your Login

Easy start. We provide you with your organization's unique URL and an email prompting you to login and create a password.

2 Enroll in Greenlight Guru Academy

Create your unique account at www.academy.greenlight.guru to access the onboarding video series and start your software training. Invite other users to enroll to get them quickly trained on necessary workspaces.

> *Guru Tip: Complete these courses and receive certifications that can be incorporated into your internal training program and routed in your QMS.*

3 Welcome Call

Confirm your milestones, timelines, and success criteria with your newly appointed Customer Success Manager. Review the onboarding schedule and plan and learn where to go for help.

4 Admin Overview Call

Attend a live call with your Customer Success Manager to set-up user logins and assign appropriate roles and permissions to your team members.

IMPORTANT MILESTONES

✔ **Welcome call** to define success and align QMS adoption plan with your company's initiatives

✔ **Add key users** to both your test and production environments

✔ **Assign roles and permissions** to active users by referencing user definitions provided by Greenlight Guru

✔ **Complete onboarding/training courses** in Greenlight Guru Academy

✔ **Route training certificates** from Greenlight Guru Academy into your QMS

✔ **Visit the Help Center** to explore the various resources available to your and your team

✔ **Experiment in your test account** after training to familiarize yourself with adding and routing a document, creating and assigning tasks, and more

✔ **Route and approve validation (IQ/OQ/PQ) package** provided by Greenlight Guru

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TRAINING

ONBOARDING CURRICULUM

● **Greenlight Guru Academy**
The Greenlight Guru Academy is an online learning center complete with both industry and software training resources. New users of Greenlight Guru will take the customer onboarding courses provided for each platform workspace. These courses consist of articles, videos, and quiz questions to ensure the user has a complete understanding of each platform feature. Users may take these courses at their own pace and revisit them any time in the future.

● **Sandbox Practice**
To reinforce the courses in Greenlight Guru Academy, your team will be given access to a Sandbox environment where you can begin practicing what you learned.

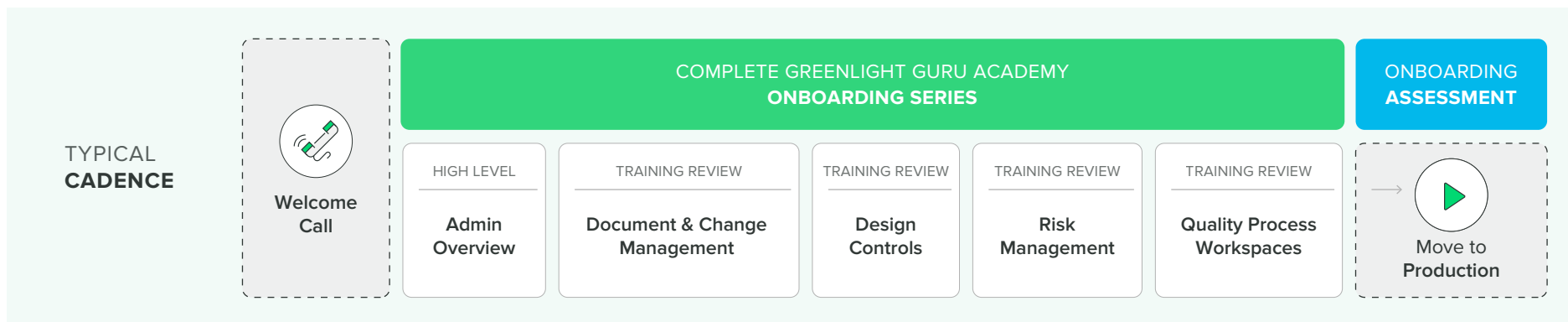REMINDER: Your Sandbox environment is intended for onboarding and to test new features, and it can be used throughout the lifecycle of your Greenlight Guru subscription.
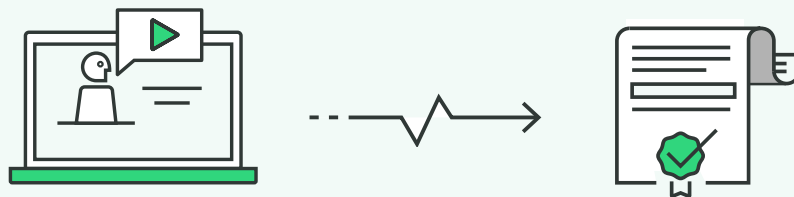
However, you will be encouraged to begin work in your production (Live) environment within 60 days of onboarding so that you are not duplicating efforts and feel confident in your new system.

● **Guru-Led Training Reviews**
After each workspace training is complete, your team will attend a call with your Customer Success Manager and a Medical Device Guru to review any questions you might have and walk through practical examples in your test environment.

To achieve the maximum value from these sessions, it is important that you have completed the relevant training courses in Greenlight Guru Academy and have practiced in your sandbox beforehand.

TYPICAL **CADENCE**

Welcome Call

COMPLETE GREENLIGHT GURU ACADEMY **ONBOARDING SERIES**

ONBOARDING **ASSESSMENT**

HIGH LEVEL	TRAINING REVIEW	TRAINING REVIEW	TRAINING REVIEW	TRAINING REVIEW	
Admin Overview	Document & Change Management	Design Controls	Risk Management	Quality Process Workspaces	Move to **Production**

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ONGOING TRAINING AND ENABLEMENT

Greenlight Guru Academy Courses
Be sure to visit the Greenlight Guru Academy regularly as we are frequently adding courses and other new resources there. These courses cover both platform how-tos and industry best practices.

Greenlight Guru users also have access to Customer-exclusive webinars hosted by our Gurus. These sessions cover everything from new feature demonstrations to tips and tricks for existing workspaces.

Product Training Webinars [Live/On-Demand]
Our Medical Device Gurus regularly host webinars to further explain the capabilities and functionalities of our software, including tips, best practices, and specific use cases. These address current pain points your business may face and give you recommendations for how to use Greenlight Guru to fulfill your company's needs.

New Release Webinars and Courses
As we continue to evolve our software to better fit the needs of medical device companies, we host customer webinars to preview and inform users about the new or enhanced functionality in our software. We also add courses to GG Academy to walk users through how to leverage new features.

Greenlight Guru Help Center
We offer a robust set of user-specific content, how-to guides, webinars, industry content and more directly in our Help Center inside the Greenlight Guru application.

You can easily search these resources by topic or keyword.

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ADDITIONAL SUPPORT & ENABLEMENT

We value our relationships with our customers and work diligently to ensure that you and your team are always supported and on track to achieve success. We will maintain a consistent cadence of communication with your team as your company grows and your needs evolve.

> "
>
> *IT'S A GREAT BUSINESS RELATIONSHIP. I WISH ALL BUSINESS RELATIONSHIPS WERE LIKE OURS WITH GREENLIGHT GURU. IT WOULD MAKE LIFE SO MUCH EASIER.*
>
> **Tonia Bryant,** *Director of Quality and Regulatory Affairs at Lucerno Dynamics*
>
> "

Our team is always happy to help you and is available via in-app support, email or by scheduling a live call with your Customer Success Manager.

Contact us ➔

AS PART OF OUR ONGOING RELATIONSHIP, YOU CAN LOOK FORWARD TO:

- ✓ **QMS Templates** *[add-on package]* includes audit-tested procedures, forms and templates that **save you time** during implementation and hold up in future audits and inspections.

- ✓ **Guru Advisory Services** *[add-on package]* from our Medical Device Industry Gurus that provide guidance and support on mission-critical processes, time-saving documents and more.

- ✓ **Ongoing Impact Reviews** to review your team's progress and current usage of the system, new feature releases and preview into our product roadmap. Here we can also strategize together the next steps for scaling your quality system.

- ✓ **Ongoing Educational Resources** in Greenlight Guru Academy that cover new functionality within our software, QMS best practices, and more.

- ✓ **Ability to share feedback** as we continue to evolve our software to better fit the needs of medical device companies. Always feel free to discuss with our team any changes that would be nice to see, issues or complications that you come across, or communicate your own workflows and processes.

- ✓ **Further engagement opportunities** as we continue to map and evolve our software and customer experience to better fit the needs of medical device companies.

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SAMPLE ROLLOUT PLAN

LEGEND | GREENLIGHT GURU | YOU | TOGETHER |

	INITIATE	WEEK 1	WEEK 2	WEEK 3	WEEK 4+	ONGOING
KICKOFF & PREP						
Appoint Customer Account Manager	GREENLIGHT GURU					
Appoint Guru	Add-On Service					
Welcome Call	TOGETHER					
Define Success Criteria	TOGETHER					
Enroll in Greenlight Guru Academy	YOU					
SET UP & TRAINING						
Provision Test Account	GREENLIGHT GURU					
Roles & Permissions Set-Up Call	TOGETHER					
Complete GG Academy Training Courses	YOU	YOU	YOU	YOU	YOU	
Guru-Led Live Platform Training Reviews		TOGETHER	TOGETHER	TOGETHER	TOGETHER	
Practice Workflows in the Test Environment		YOU	YOU	YOU	YOU	
Provision Production Account					GREENLIGHT GURU	
Adoption Assessment					TOGETHER	
LIVE: Begin Activity in Production Account					YOU	
SUPPORT & ENABLEMENT						
Guru-Led Consulting Services (if applicable)						Add-On Service
Impact Reviews with Customer Success Manager						TOGETHER
Release-Specific / Product Webinars						GREENLIGHT GURU
Support	GREENLIGHT GURU	GREENLIGHT GURU	GREENLIGHT GURU	GREENLIGHT GURU	GREENLIGHT GURU	GREENLIGHT GURU
Help Center Resources	TOGETHER	TOGETHER	TOGETHER	TOGETHER	TOGETHER	TOGETHER
Greenlight Guru Academy Courses *Industry & Software Best Practices*	TOGETHER	TOGETHER	TOGETHER	TOGETHER	TOGETHER	TOGETHER
Validation Package Updated with Every Release	Validation Package					Ongoing Validation

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THANK YOU FOR PARTNERING WITH GREENLIGHT GURU

We look forward to providing your team with fanatical support as you adopt Greenlight Guru and achieve success.

Contact us ➜

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317-960-4220

WWW.GREENLIGHT.GURU