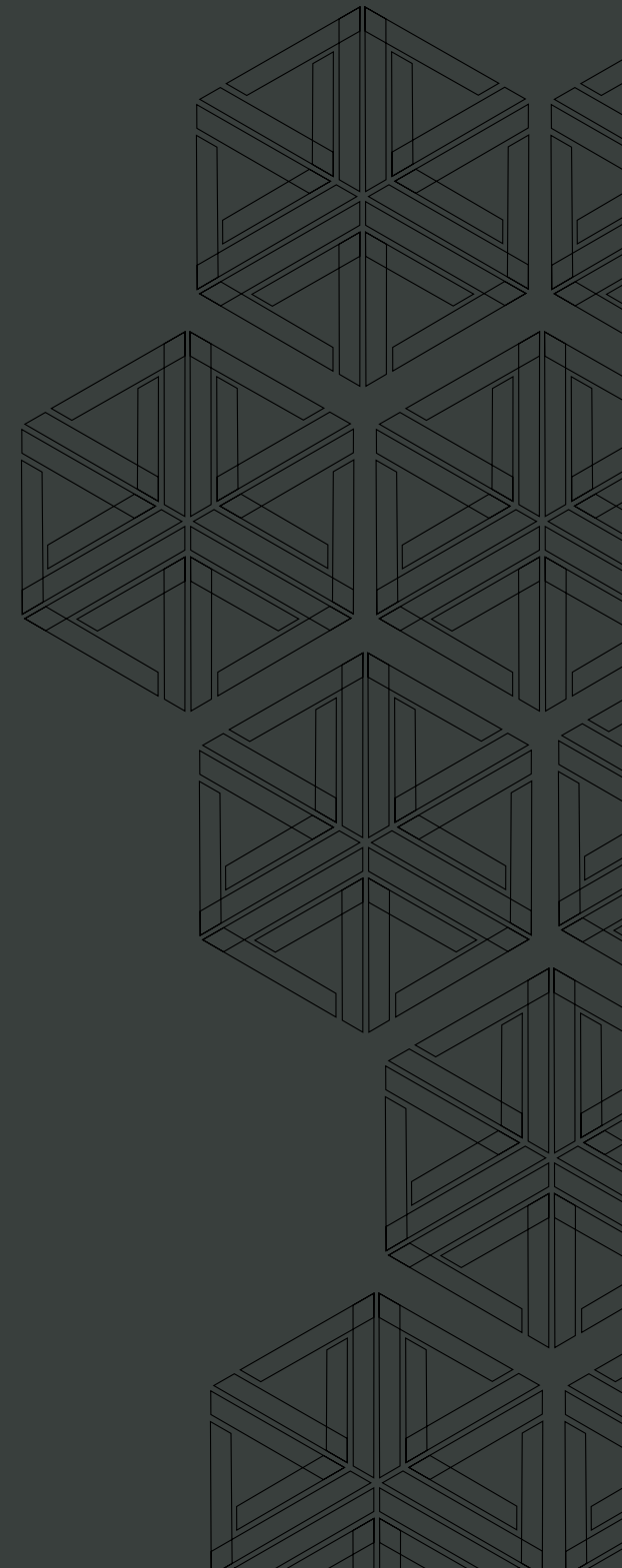




CUSTOMER ONBOARDING & TRAINING GUIDE



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INTRODUCTION

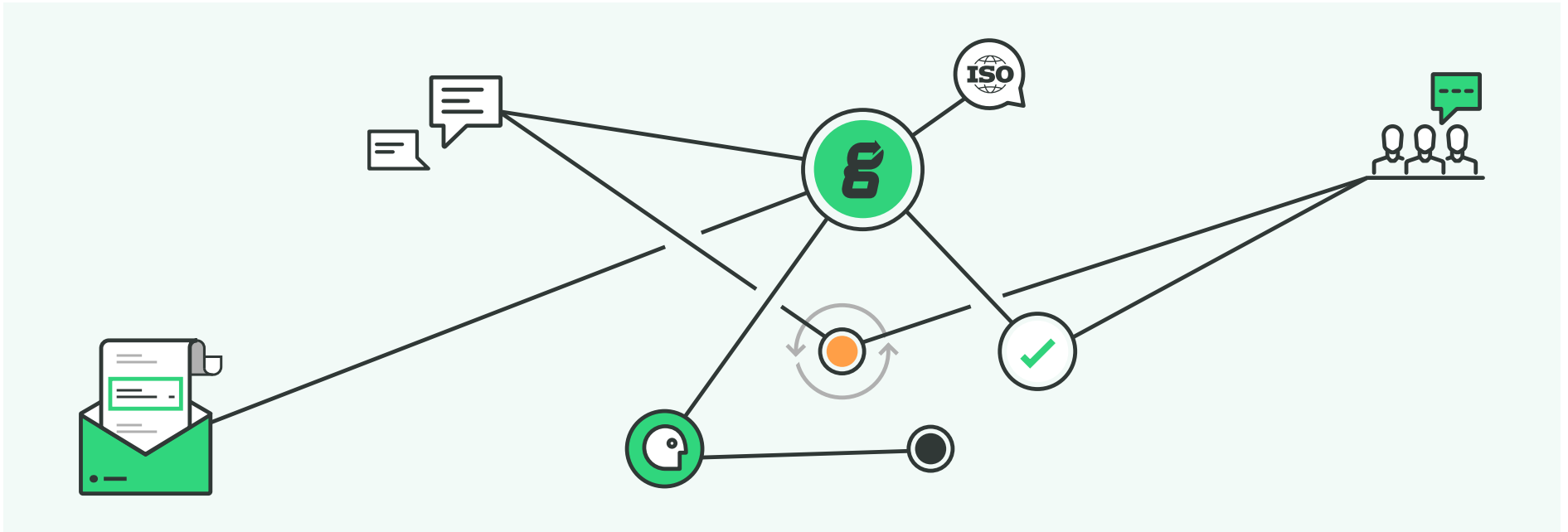
Your partnership with Greenlight Guru is initiated before you begin to adopt our system. In fact, since day one of our relationship we have been listening to you, your team, and your company's needs, current challenges, and future goals. We have curated an agreement on why Greenlight Guru serves as an ideal fit for your organization and how we are going to make that happen.

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

Our Customer Success team is here to do more than solve technical issues. They are here to help your team realize and extract full value from your QMS to further your business. Your outcomes shape our outcomes - **when you succeed, so do we.**

Throughout your onboarding and training, our Customer Success Team will train, guide, and enable your team to implement a quality system and begin deriving value from our software. As your team is ramping up and learning how to use Greenlight Guru and its work-space specific workflows, our team will begin to further explore other areas in which we can define success and derive value in your first 30 days with Greenlight Guru.





OUR COMMITMENT TO YOU:

- ✔ We provide you with workspace-specific training sessions to get you and your team onboarded quickly
- ✔ We tailor our training, product webinars, and additional content to better fit your needs
- ✔ We provide value-add tips to maximize your usage and experience with the software
- ✔ We stay up-to-date on the industry and provide you with industry best practices (and more)
- ✔ We provide on-going training to keep you and your team up-to-date and engaged with our software's capabilities
- ✔ We continuously generate a robust offering of how-to guides, validation resources, best practices for using our software and more in our Help Center
- ✔ We assist customers through important milestones throughout their journey as a medical device company
- ✔ We support your team with personalized assistance available to you via in-app support, email, and live calls

OUR GURUS

Our in-house medical device Gurus are here to enhance your experience with Greenlight Guru. They'll provide clarity around medical device industry best practices, along with software best practices to ensure that you have a best-in-class quality system and keep quality at the forefront of your business.



HERE ARE SOME HIGHLIGHTS OF
**OUR TEAM'S COLLECTIVE HANDS-ON EXPERIENCES
IN THE INDUSTRY, PRIOR TO JOINING OUR TEAM:**

295

medical devices brought
to market

495

processes validated

1100

SOP's authorized

71

Quality system
implementations

30

ISO 13485 certifications

65

FDA & ISO audits

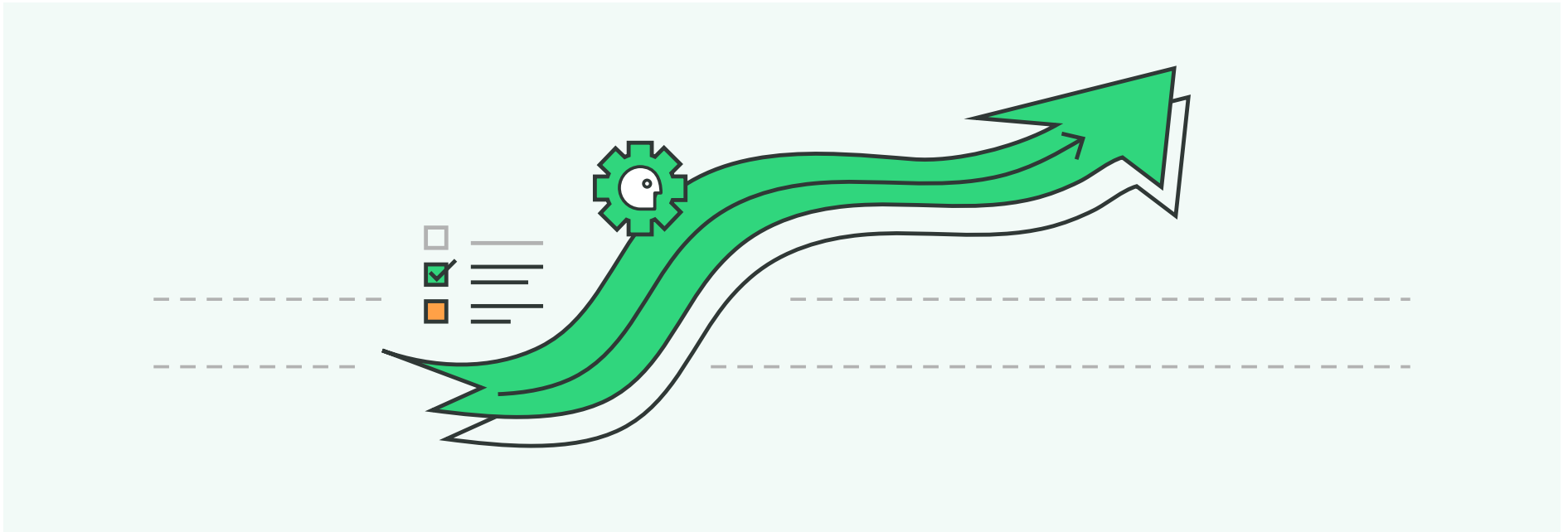
OUR TEAM'S COLLECTIVE EXPERIENCE IN THE MEDICAL DEVICE INDUSTRY INCLUDES:



- ✓ 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).
- ✓ Significant product development experience from initial concept through manufacturing and supply chain, including achieving 60601 certification.
- ✓ ISO 13485 Lead Auditor experience.
- ✓ 20+ years in the medical device industry with 40+ products to market.

“ 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*



ONBOARDING OBJECTIVES

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

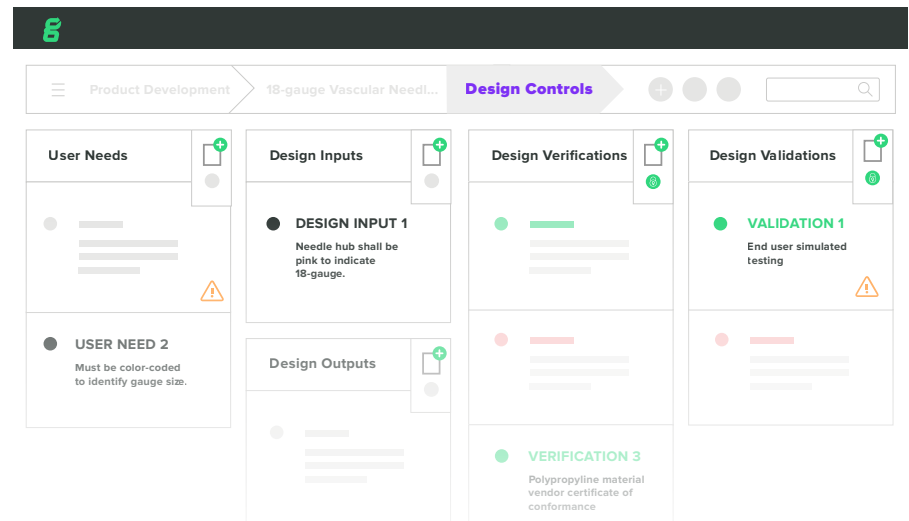
We strive to get to know your team and put an actionable plan in place for your team to create or realize value with Greenlight Guru. Our team will work with you to better understand current processes in place, define goals and use of Greenlight Guru, and create an action plan for adopting our system. We are committed to meeting your team where they are at whether you are bringing your first medical device to market or looking to advance and scale quality at your company.

After your first call with one of our Customer Success Managers, we will define your team's unique success criteria for using Greenlight Guru and provide tailored training activities and next steps to drive you towards success.

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 commence your onboarding experience.

All we need is your participation as we collaborate to implement an action plan and cover best practices to assist you and your team in adopting our 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 Welcome Call**
Review the success criteria defined from your survey results to review your onboarding journey and what to expect with Greenlight Guru.
- 2 Tech Kick-Off Call**
Initiate account creation and set-up of users required to go through training. Review best practices for required data in implementing a QMS and key milestones within your team's unique action plan.
- 3 Scheduling Webinar-Based Training Sessions**
Schedule and attend training webinars tailored to specific workspaces to get your team started.
- 4 Align action plan with key milestones to track progress**
Ensure that action items are on track towards your company's milestone(s) to get the most out of your Greenlight Guru experience
- 5 Dedicated CSM Check-ins**
Review your team's progress and current usage of the system, get updates on latest product releases, and more information about using Greenlight Guru. From here we can then strategize together next steps for helping you reach success.

IMPORTANT MILESTONES

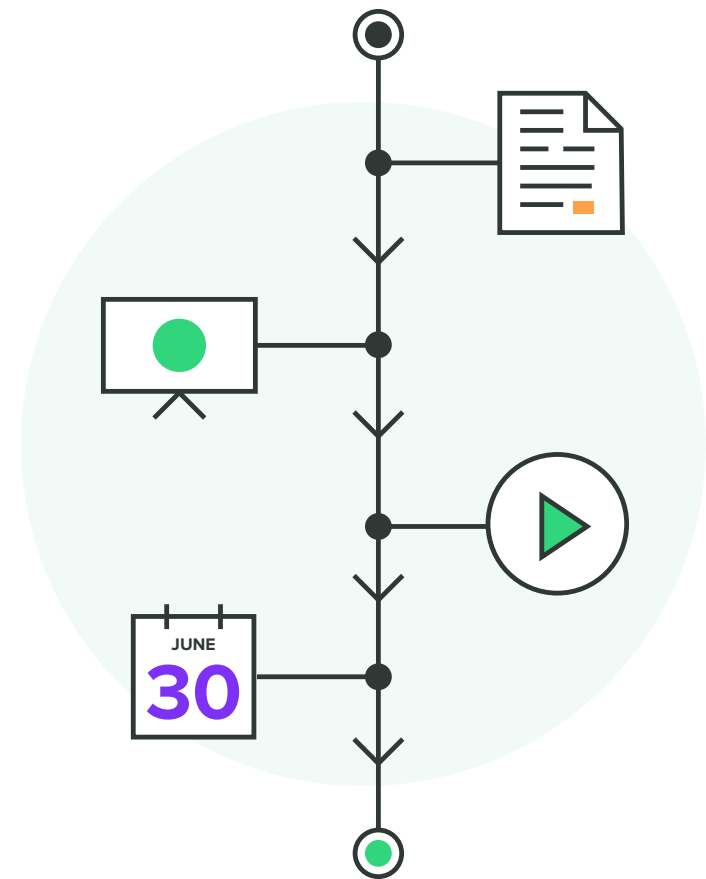
- ✓ **Welcome call** to define success and align QMS adoption strategies with your company's initiatives
- ✓ **Add key users** to both your test and production environments
- ✓ **Assign roles and permissions** to active users by referencing user definitions provided by Greenlight Guru
- ✓ **Live trainings** attended by active users
- ✓ **Visit the Help Center** to explore the various resources available to you and your team
- ✓ **Experiment in 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

DEFINING SUCCESS WITH GREENLIGHT GURU

To better enable your team, our Customer Success Team must understand how you currently – or would like to – define success.

Each customer has their own set of challenges, goals, and internal resources available to them. The ability for us to meet your team where they are is important for us to maximize your experience using Greenlight Guru. Defining success for your company will enable us to design a collaborative action plan for your first 30 days and beyond.

Recognizing your company's goals and defining success and with Greenlight Guru will better enable both parties to prioritize goals, implement strategies, and create action plans on an ongoing basis that ensure you are deriving value from our software and propelling your team towards success.



“ **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

TRAINING

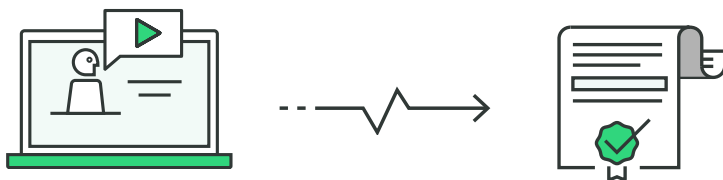
ONBOARDING CURRICULUM

✓ Training Webinars

Weekly webinars, hosted by our own Gurus, are tailored to train you and your team on how to navigate the workspaces within our software. These in-app demonstrations provide a comprehensive overview of the workspace, specific features, and best practices – getting your team quickly acclimated to the software. Depending on the package(s) purchased, additional 1:1 training may be available to your team for further overview of software capabilities.

✓ Greenlight Guru Workspace Certifications

During each tailored training session is a quiz to gain your certificate of completion and a badge for proof of workspace competency to ensure that users can confidently navigate the software post-training.



ONGOING CURRICULUM

✓ Product Webinars

On an ongoing basis, product webinars are hosted by our Gurus to further explain capabilities and functionalities of our software, including tips, tricks, 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 quality needs.

✓ Greenlight Guru Help & Resource Center

We offer a robust set of user-specific content, how-to guides, webinars, industry content and more to further elevate your knowledge on the capabilities and best practices within the software.

✓ New Release Webinars

As we continue to evolve our software to better fit the needs of medical device companies, we host customer-exclusive webinars to preview and inform users about the new or enhanced functionality in our software.

ADDITIONAL SUPPORT & ENABLEMENT

We value the relationships with our customers and work diligently to ensure that you and your team are always supported and on track to achieve success. Throughout your experience with Greenlight Guru we will touch base to assure that we are supporting you and your team as your company grows, evolves, and continues to redefine success.

“

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 ARE AVAILABLE VIA IN-APP SUPPORT, EMAIL OR BY SCHEDULING A LIVE CALL.

AS PART OF OUR ONGOING RELATIONSHIP, YOU CAN EXPECT:

- ✓ **Dedicated check-ins** with your Customer Success Manager to review your team's progress and current usage of the system. From here we can then strategize together next steps for helping you reach success.
- ✓ **Educational resources** provided on an on-going basis covering new and enhanced functionalities 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 best practices.
- ✓ **Further engagement opportunities** as we continue to map and evolve our software to better fit the needs of medical device companies.
- ✓ **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.
- ✓ **QMS Templates** [add on package] which include audit-tested procedures, forms and templates that save you time during audits and inspections.

SAMPLE ROLLOUT PLANS

LEGEND

GREENLIGHT GURU

YOU

TOGETHER

	PREP	WEEK 1	WEEK 2	WEEK 3	WEEK 4+	ONGOING
KICKOFF & PREP						
Account Invite	GREENLIGHT GURU					
Welcome Call	TOGETHER					
Define Success Criteria	TOGETHER					
Appoint Customer Success Manager	GREENLIGHT GURU					
Appoint Guru	GREENLIGHT GURU Add-on service					
Finalize Training Schedule	TOGETHER					
SET UP & TRAINING						
Provision Test & Production Accounts	GREENLIGHT GURU					
Tech Kick-off Call	TOGETHER					
Assign User Roles & Permissions	YOU					
Core Platform Training		TOGETHER	TOGETHER			
Workspace-Specific Training				TOGETHER	TOGETHER	
ONBOARDING						
Additional User Training		TOGETHER	TOGETHER	TOGETHER	TOGETHER	
Validation Protocols (IQ/OQ/PQ)		TOGETHER				TOGETHER
QMS Onboarding Plan		TOGETHER	TOGETHER	TOGETHER	TOGETHER	TOGETHER
Go Live [Production Account]					YOU	
SUPPORT & ENABLEMENT						
Dedicated CSM Check-ins						GREENLIGHT GURU
Release-Specific / Product Webinars						GREENLIGHT GURU
Training Webinars						TOGETHER
Support Team Access	GREENLIGHT GURU	GREENLIGHT GURU	GREENLIGHT GURU	GREENLIGHT GURU	GREENLIGHT GURU	GREENLIGHT GURU
Milestone Achievement Recognition	GREENLIGHT GURU	GREENLIGHT GURU	GREENLIGHT GURU	GREENLIGHT GURU	GREENLIGHT GURU	GREENLIGHT GURU
Updated Help Center Resources	GREENLIGHT GURU	GREENLIGHT GURU	GREENLIGHT GURU	GREENLIGHT GURU	GREENLIGHT GURU	GREENLIGHT GURU

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.

greenlight guru

317-960-4220

WWW.GREENLIGHT.GURU

