# Advanced Support package

Support and guidance throughout the implementation process and beyond

Support

Training

Guidance

# SAMpeople's Advanced Support package

This document explains how our Advanced Support Package takes your trust through each stage of support you'll receive from our team as a valued customer.

## Data migration

Whether you're embarking on moving your employee data and HR processes to a cloud-based HR solution for the very first time or transferring data from an existing system (or even multiple systems), we're here to help, support and guide you throughout the implementation process and beyond.

## A great user experience

We want SAMpeople to be integral to the day-to-day operations of your trust. SAMpeople has been designed to support the administrative processes, managerial decision making and employee engagement requirements of a busy workplace. But most of all, we want the introduction of SAMpeople to 'create better futures for our children through innovative people solutions'.

## Support every step of the way

Find out what's included at every step of the journey and what bolt-on's are available to make sure you get the very best results from SAMpeople.

## Your advanced support journey overview

**Phase 1: Trust programme management**
- To make sure we get your requirements right first time every time, we dedicate a SAMpeople Programme Manager to your journey.

**Phase 2: Onboarding (data migration and system build)**
- Working with our Customer Onboarding Partner to make sure good data and workflows go into SAMpeople allowing for good data out, effective processes and a happy workforce.

**Phase 3: Customer education and training**
- Work with our Customer Education Specialists to build strong engagement at all levels of the workforce.

**Phase 4: Customer success**
- Our Customer Success Officers on our Customer Success team will support you to get the best outputs for your trust from SAMpeople.

**Phase 5: Trust account management**
- A Senior Account Manager will be assigned to your trust to support customer happiness and retention.
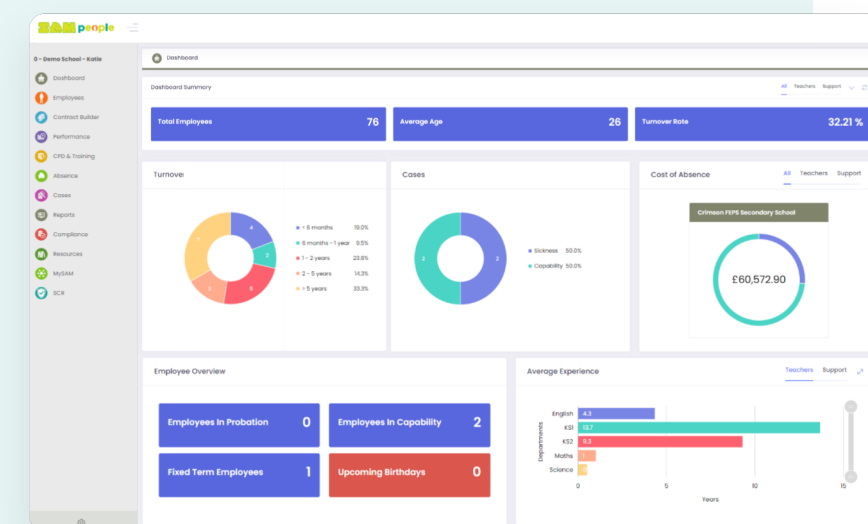
# Phase 1: Trust programme management

A Senior Lead will be assigned to your trust throughout the onboarding journey. Initial onsite or remote project launch strategy meeting to discuss:

- ✓ The trust's context including growth plans, timescales, capacity for the project launch, change management planning, how to engage your employees, data migration and the format required.

- ✓ Agree principles around trust centralisation/decentralisation.

- ✓ Exploration and identification of organisation specific requirements relating to users, permissions, workflows, people strategy, the trust approach to implementing an HR change project, any associated risks.

- ✓ Incorporation of SAMpeople Recruit and SAMpeople Payroll onboarding into the project, if purchased.

- ✓ Production of project plan with timelines showing key milestones and associated actions for everyone involved.

- ✓ Weekly meetings scheduled to make sure the project remains on track, or, adjustments agreed as needed.

- ✓ Regular prompts and reminders!

- ✓ Termly review meetings throughout the implementation period.

> **"The support team are very supportive, and any queries are answered quickly on the SAMpeople Hub."**
>
> **Sam Andrews**, Head of HR, Dovecote School

# Phase 2: Onboarding - Trust data migration and system build

Our SAMpeople system set up is charged separately to the Advanced Support Package and includes:

- ✓ SAMpeople Hub access 24/7 – access user guides, help sheets, videos, register for webinars, submit tickets and share information with us securely.

- ✓ Access within the SAMpeople Hub to the "SAMpeople Academy" which includes our sandbox account and training sessions both live and recorded to access at any time.

- ✓ Unlimited query management via telephone or SAMpeople Hub Mon to Fri 8.30am to 4.30pm. Our SAMpeople Hub is accessible by Master & Full Access Users only.

- ✓ Implementation of CORE & Essential features.

- ✓ 'CORE' data build and upload to SAMpeople.

- ✓ The configuration of essential elements.

- ✓ Up to 5 mail merged documents ready to use in your templates area with training for core users on how to add additional documents and make changes.

- ✓ Testing of your set up arrangements including management structure, departments, workflows and system permissions to ensure they are all working effectively.

- ✓ Onboarding compliance and sign off.

- ✓ MIS integration set up, if required.

**SAMpeople Advanced Support**

# Phase 3: Customer education and training

We want your system users to love SAMpeople and we will support you to become system experts through bespoke remote training sessions, both during the onboarding stage, the implementation stage and throughout your journey with SAMpeople.
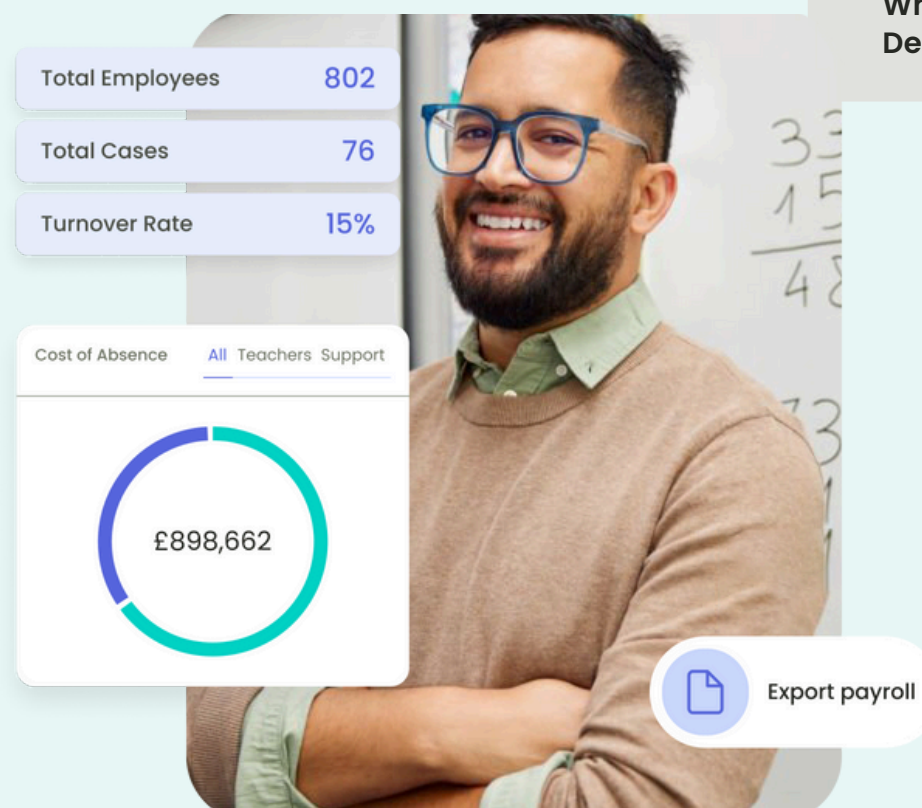
## Session 1: Refresher demo (60 mins)

An overview of SAMpeople key modules, features and benefits to your organisation. A 'reminder' of what you have purchased.

**Who is this session for:** Invite your key stakeholders to gain buy in
**Delivery method:** A remote session to suit you

## Session 2: Fundamentals of SAMpeople Part 1 (90 mins-2 hrs)

- System sign in and navigation
- Add and offboard employees
- Working patterns
- Set an employee as a leaver
- A look at an employee profile
- Absence module fundamentals
- Add, update or end an absence
- Create an absence case and manage absence triggers
- Run reports

**Who is this session for:** Your trust team, key users, business managers, office administrators
**Delivery method:** Multiple sessions through the week to offer flexibility

Total Employees 802
Total Cases 76
Turnover Rate 15%

Cost of Absence    All Teachers Support
£898,662

Export payroll

## Session 3: Fundamentals of SAMpeople Part 2 (90 mins)

- Add/edit salary rows and allowances
- Generate and prepare payroll update report for export
- Add employee details (school/Further Education workforce census data)
- Run SWFC/FEWFC GAPS report and generate XML
- Create/manage employment relations cases and set case tracks
- Upload templates to streamline workflows
- Run reports for specific data
- Access profiles and user settings (2 factor authentication)
- First look at MySAM, managing employees (if enabled) and cases module

**Who is this session for:** Key users in school/trust
**Delivery Method:** Multiple sessions through the week to offer flexibility

## Session 4: Line Manager Training 'MySAM' (1 hour)

- Manage personal details, requests, (absence, TOIL, TTO+ days/hours) and Additional Hours payments
- Authorise/reject absence requests. Team absence overview
- Complete employee return to work forms
- Approve/reject TTO+ requests and manage TOIL (if enabled)
- View and oversee MyTeam and MyActivty
- Manage MyActivity (sign, read or comment on documents)
- View employees performance activities and breakdowns

**Who is this session for:** All line managers
**Delivery method:** Recorded session to share with line managers

## Ongoing customer education and training

Webinar based training, videos and resources are available 24/7 through SAMpeople Hub.

Introductory meetings with the key users of new schools joining the trust to welcome them to SAMpeople and provide an overview of SAMpeople Hub, training academy and an overview of your trust HR software and services with SAMpeople. Webinar based training for any features enhancements.

## Session 5: Employee MySAM Training (30 mins)

- Manage personal details
- Manage employee entitlements
- View absence record, requests and status
- Approve/reject return to work documents with comments
- Manage documents within MyActivity (sign, read or comment on documents issued)
- View employee performance activities and breakdowns

**NB.** Guides and documentation are available within the SAMpeople Hub to support employee MySAM training.

**Who is this session for:** All trust employees
**Delivery method:** A recorded session to share with all employees

# Phase 4:  Customer success – your priority roadmap

**Next level implementation support for your trust.**

Your nominated Customer Success Partner (CSP) is available to support your trust to reach the next level and complete your people software implementation journey. A discovery session will be scheduled with your CSP to determine your priorities for the final stages of implementation.

**Termly Programme Manager Meetings** - In addition to your regular meetings with your nominated CSP, you'll receive a 1 hour termly personalised meeting at trust level with your Programme Manager. This meeting is an opportunity to review your system progress and usage and to support with the development of a plan to roll out any new features, integrations, challenges and to agree the next steps.

# Phase 5:  Account management

Once your implementation journey is complete, you'll be handed over to our Account Management team who will continue to meet with you termly to make sure you are receiving the best possible service and support and want to continue your agreement with SAMpeople. You'll be allocated direct contact with one of our Senior Account Managers.

**"Customer support has been outstanding, from start to finish."**

**Donna Harrison**, HR Manager, Penk Valley Academy Trust

## Advanced Support Package – Trust investment

£200 per school, per year, for the duration of the licence agreement, invoiced annually upfront. This package is mandatory for all Multi-Academy Trusts who purchase SAMpeople.

# Simplify and connect the whole employee journey

From hiring to payroll to case management - our suite of integrated products and services help you streamline, support and join up every aspect of people management in education.

> "The impact has been amazing, we are seeing change and we are seeing each school engaging with the systems. It's helping build an inclusive culture."
>
> **Sally Boaden**, Chief Finance & Operating Officer, Raleigh Education Trust

✓ **People Management**

✓ **Recruitment**

✓ **Pay and Pensions**

✓ **HR Advice and Support**

✓ **MIS Integrations**

## We help over 2,000 schools and trusts to:

### Finally understand the complete picture of their staff

Our products join up all your staff data, so you can track every interaction. Turn scattered touchpoints into clear insights about absences, recruitment, retention and wellbeing, and know exactly where to focus your attention.

### Scale HR without increasing headcount

With a strong HR infrastructure, it's easy to roll out consistent processes and policies and treat everyone the same way. And with our people services team at FusionHR, HR advice, consultancy and strategy is only a phone call away.

### Dramatically reduce HR admin for everyone

With self-service tools for employees, and helpful reports, automations, alerts and templates for managers, HR quickly becomes less of a mountain.

## We're education people, people

We created SAMpeople because we've been there.

Founded by former school staff and our education HR specialists at FusionHR, we're bringing together decades of HR expertise with the latest in people management technology.

Read our story at **sampeople.co.uk/about**

## For more infomation

→ sampeople.co.uk

→ 01924 907319