TRAVERSE® SERVICES

With a Traverse subscription, you're not getting just a software product. Our best-in-class services and support teams are part of your solution and will help set you up for success.

These team members have extensive experience in human services and with implementing technology within the field. They customize each project activity to meet your agency's unique needs.

Technology projects are people projects. That's why we have a dedicated services team focused solely on the success of your project. We bring a consultative approach to every interaction, so you walk away with a better understanding of your business, internal champions of change, and proven best practices that positively impact your important work.

KEY BENEFITS

- Blend of technical, business, and practice expertise that puts your teams first
- Solution catered to your agency structure, resources, and staff capabilities
- Integration of technology within day-to-day business processes
- Hundreds of years of direct human services experience to guide you on the path to success
- Empowerment and tools to maintain practices established during the project

PROJECT ACTIVITIES

- Change Management
- Professional Project Management
- Business Process Discovery
- Taxonomy Development
- Forms Building and Maintenance
- Data Integration and Document Migration
- Training and Support
- Customer Success

> "We went with Northwoods because we were so impressed by your customer service. It feels like you understand the world of social work and how chaotic it can be, and you're trying to find ways to really support us.

—**SHELLY (MICHELLE) SELINGER,**
Child & Family Manager, Carver County Health & Human Services

> " Implementing a new system is challenging, but the way Northwoods was able to coach through that and be extremely available has made a huge difference in how the software was received by our staff.
>
> **—HANNAH WEBSTER,**
> *Child Welfare Manager,* Mesa County
> Department of Human Services "

CHANGE MANAGEMENT

- Support long-term process change

- Empower internal champions to facilitate activities that effectively drive the adoption, usage, and proficiency of Traverse

- Create and monitor goals for the agency to measure success

Our change management practice prepares your agency for a new way of doing business. Our consultants partner with your champions to assess your agency's readiness, create a change strategy, develop a communication plan, and provide tools/resources for a successful implementation. With this support, we assist you in becoming experts in Traverse and prepare your agency for lasting success.

PROFESSIONAL PROJECT MANAGEMENT

- Provide oversight to ensure effective utilization of resources and budget

- Communicate project progress to key stakeholders

- Mitigate risks, solve problems, and resolve conflicts

Your dedicated Northwoods project manager coordinates resources and keeps things on track to ensure project milestones are met and your agency is satisfied with your implementation. Our team has a proven reputation of success in delivering projects within scope, on time, and on budget.

BUSINESS PROCESS DISCOVERY

- Put people at the center of technology and process change

- Manage change from the top down to ensure maximum solution adoption

- Empower internal champions to sustain process changes over time

We work together to identify how and when Traverse will impact key business processes. Your internal project leaders make sure end users understand those changes (and why they were made) when learning the software and hold staff accountable to adopting them. Successful organizational change starts with designing processes that add value to end users. Our team will help you communicate that value effectively.

> "I almost never refer to Northwoods as a vendor anymore because we are partners."
>
> **—TODD SHANLEY,**
> *CIO*, Cabarrus County North Carolina

TAXONOMY DEVELOPMENT

- Meet your agency's specific information needs
- Create a system that is logical and easy to learn so workers readily adopt it
- Reduce the time it takes workers to find and retrieve client or case information

A subgroup of agency staff works with our team to create a shared and agreed-upon agency-wide naming convention and file structure called the taxonomy, used to organize your case files. This is developed based on your current case files, forms lists, and examples from peers. We also provide guidance and consultation based on our industry expertise.

FORMS BUILDING AND MAINTENANCE

- Consult on the best approach for determining the forms your agency hould use
- Ensure forms are correct and always up to date
- Create exact match forms that look like the original version required by providers

Deciding which forms to digitize can be challenging, while designing them is very technical. That's why we have an entire Forms Design Team that works with you to build the exact forms your agency needs—from state and local forms to those provided by community partners. They also provide best practices and advice to make the process go smoothly. After the project, our maintenance model allows you to change or add new forms as needed.

DATA INTEGRATION AND DOCUMENT MIGRATION

- Put people at the center of technology and process change
- Manage change from the top down to ensure maximum solution adoption
- Empower internal champions to sustain process changes over time

We work with your IT team to build an integration solution that automatically moves data on a regular cadence from within your agency's existing system(s) to Traverse, bi-directionally when possible. We can also import documents from your existing document management system into Traverse instead of staff doing it manually. This makes the solution even more effective when it is utilized by staff.

> The approach that Northwoods has to training our staff shows the commitment to the realities of this work on a day-to-day basis.
>
> **—JOHN PUGLEASA,**
> *Director,* Houston County
> Department of Human Services

TRAINING

- Offer flexible options based on your agency's size and goals
- Empower in-house experts to support product usage, process changes, and future onboarding
- Iron out issues with a small group before rolling out the full solution

Northwoods can adopt any training model based on your agency's needs and resources. Our team can facilitate all training, or we can employ a "train-the-trainer" model, where we work closely with a small group of staff who then lead the agencywide rollout with our support. End users are also supported by their coaches, who have been part of the project from the beginning.

SUPPORT

- Provide ongoing education and support via the Traverse Resource Center
- Help workers get the right answer as quickly as possible
- Support how you want it, when you want it

Traverse is intuitive and easy to learn and use; however, when someone needs help, we offer multiple options so they can find a solution in the way they want. End users are supported through in-app resources, such as interactive walk-through videos and contextual help. Workers can also use live chat, video chat, or screen share to talk to one of our experts as needed.

CUSTOMER SUCCESS

- Advocate for you with other teams inside Northwoods
- Provide resources to help you navigate change and sustain adoption
- Consult with your coaching team to create a roadmap for ongoing success

Your agency's dedicated Customer Success Manager (CSM) will help you use your solution to its full potential throughout your entire tenure as a customer. This starts during implementation, when they work with the project team to learn your challenges and goals. Your CSM will consult on your key initiatives to help you succeed and will keep you informed of relevant Northwoods news and product changes.

Visit teamnorthwoods.com/resources/customer-stories to learn more about how your industry peers use our technology to make an impact on caseworkers and clients.