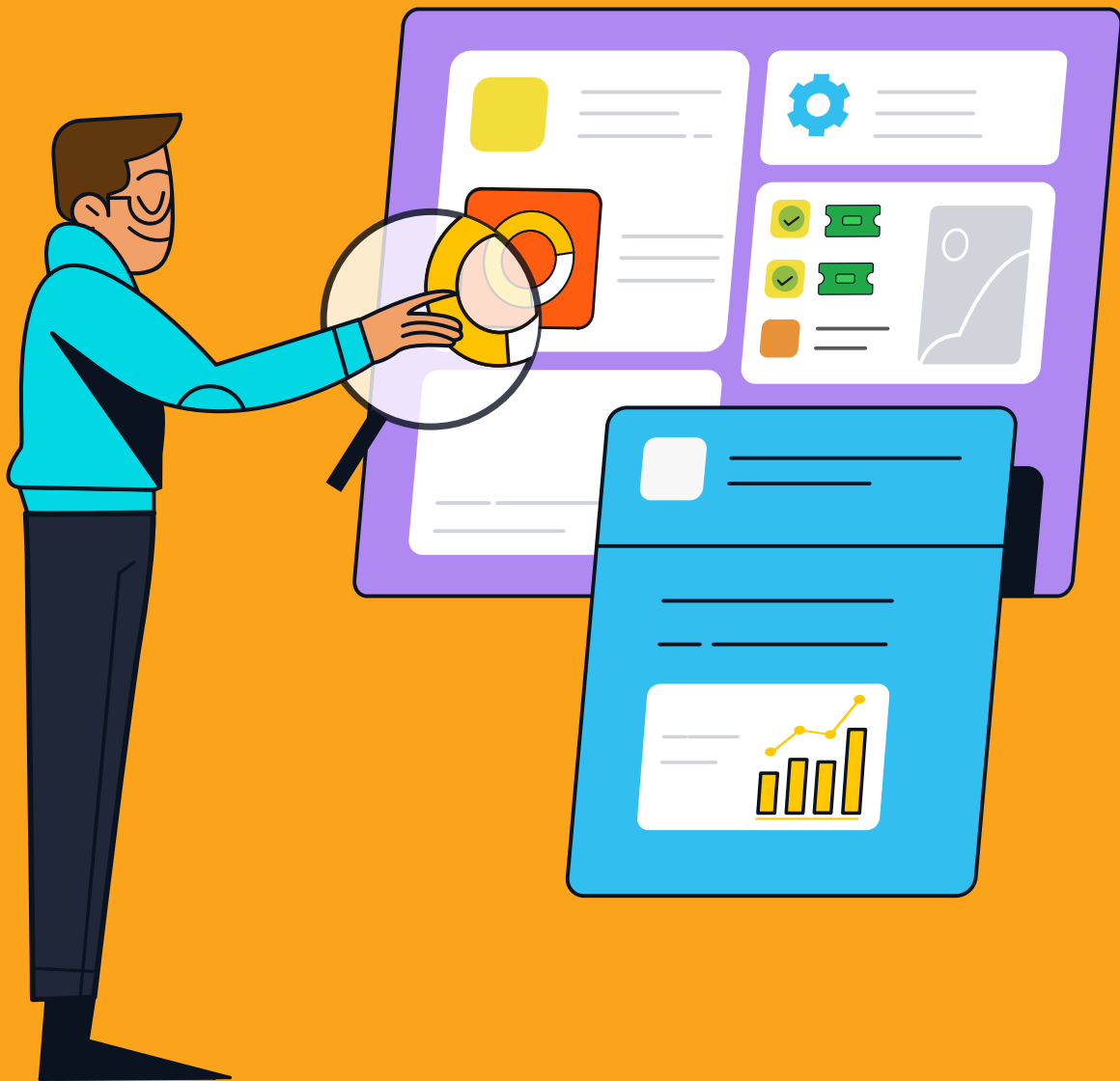# freshworks

Optimization Services

Overview

As people, processes, and technology evolve over time, you might find your Freshworks product(s) in need of a refresh. We'll design a custom package to meet your business's unique needs and ensure you're getting the most value out of your investment.
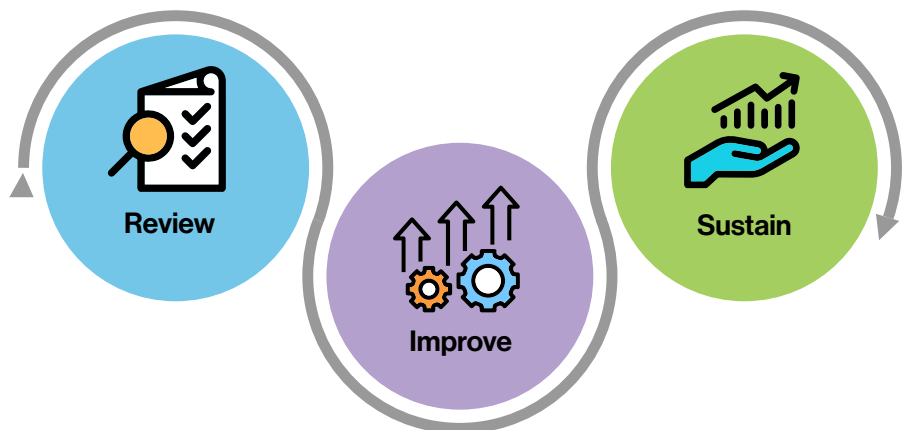
Key Benefits

Our experts will identify areas for improvement and partner with your team to quickly roll out a successful solution.

- **In-depth analysis:** Review of your goals and thorough evaluation of your current configuration.

- **Enhancement recommendations:** Best practices sharing, configuration design, and guidance about how to best leverage the product.

- **Hands-on assistance:** A collaborative approach to configuration enables your team to learn the product while working closely with our experts.

- **Training for long-term success:** A deep admin training session that will equip your admin(s) to successfully maintain and update configuration moving forward.

Example Use Cases

Here are just a few examples of use cases we've solved in the past:

- After recent growth or a reorganization, a company needs to update configuration

- A team wants to adopt recently released product features or features that weren't setup during initial onboarding

- The system hasn't been maintained (e.g. the original admin left organization) and there are too many form fields, out-of-date drop-downs, or mis-labeled items

- An organization initially self-implemented the system and is looking for best practice recommendations to enhance the setup

Review

Improve

Sustain

What's included:

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Scoping & SOW Process	The Freshworks Optimization team will work with your team and Customer Success Manager to understand your requirements and desired business outcomes. After, a Statement of Work(SOW) will be shared that outlines a timeline, resources, and scope for the engagement.
Kickoff	Meeting between your team and the Freshworks Optimization team to align on engagement scope, timeline, resources, process and expectations.
Requirements Gathering,Solutioning, and Project Plan creation	The Freshworks Optimization team will review detailed requirements, share a recommended solution, and complete project planning.
Joint Configuration	Two weekly, one-hour calls between your team and Freshworks Optimization specialist, who will provide guidance and assistance with out-of-the-box configurations.
Integrations	Freshworks will provide guidance on how to set up out-of-the-box Freshworks Marketplace integrations.
Training	Following a train-the-trainer model, your Freshworks Optimization Specialist will conduct one, one-hour remote* admin training session. The training will be recorded and shared for future reference.
Handover	Your Freshworks Optimization Specialist will provide a two-week hypercare period after you go live with your updated configuration. A handover will be completed with your Customer Success Manager, who will continue to be your main point of contact.

Add Ons

Custom Integrations	Integrations with systems not in the Freshworks Marketplace will be scoped and priced separately.
Additional Training	Freshworks can provide additional remote training at an additional cost.
Extended Engagement	Any engagement extending beyond the agreed time period will incur additional charges
Onsite visits	Onsite visits can be opted for at an additional cost.
Migration	Data migration services can be provided at an additional cost.

Onsite visits are priced additionally, T&E not included

Your Optimization team:
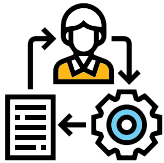
Engagement Manager

Plans resources and manages expectations with key stakeholders.

Solution Architect

Designs the end-to-end solution architecture & roadmaps to ensure scalability.

Product Specialist

Provides product expertise during requirements gathering, configuration, and go-live.

Customer Engineer

Builds integrations and apps to customize the Freshworks Platforms per your requirements.

To learn more about Optimization Services, please consult with the sales team or your Customer Success Manager.

About Freshworks

Freshworks makes it fast and easy for businesses to delight their customers and employees. We do this by taking a fresh approach to building and delivering software-as-a-service that's affordable, quick to implement, and designed for the end-user. Unlike legacy software, Freshworks builds tech that works for everyone, making it easy for IT, customer service, sales, marketers and HR to do their job and delight their customers.

More than 50,000 companies use Freshworks' SaaS to enable a better customer experience (CX, CRM) and employee experience (ITSM, HRSM).

freshworks.com