

What can I expect after I sign a Time Bank Online sales order with IDI?

Last Modified on 10/12/2021 10:20 am EDT

Wondering what happens for the first roughly 100 days after you become an IDI customer?

Once you sign a sales order for one of our Time Bank Online solutions, it is our attempt to begin the process of turning you into a customer for life!

Our hope is to kick-off our new relationship in a significant and meaningful way, and keep you informed about what to expect each step of the way from implementation to ongoing support and account management.

Wondering what to expect overall from a relationship with IDI?

Check out [IDI's Proven Process](#) (one pager) for an explanation of what solutions we provide, client testimonials, and an illustration of our ongoing cross-departmental interactions with partners and clients over the life of our relationship.

What are the steps in a Time Bank Online Implementation project?

Check out [Our Implementation Process in 7 Steps](#) web page and our [Thanks for Buying, Welcome Aboard, and Next Steps](#) video for a high-level overview of the steps you will move through as you transition from Sales to our Implementation Team, to the evaluation, the documentation of the solution, the configuration, the test plan design, the training and implementation, and the user testing that will happen before Go Live.

When do I first hear from my Implementation Team?

Upon receipt of a signed sales order, you will receive an email from your IDI sales rep letting you know what to expect next. (**Note:** *If your IDI solution was sold through one of our partners, it could take a few weeks for the sales order to get to us.*) Our Business Solutions Analyst will be checking-in with your HCM vendor(s) and then will coordinate a full team virtual call/meeting to kick off the Time Bank portion of your project. This meeting is intended to:

- Introduce all team members
- Review the scope of the project
- Gather any projected timelines

- Determine any known hurdles
- Begin the analysis process that will lead to a Technical Design Document

What can I be doing while I'm waiting for my implementation to start?

Time Bank Online relies on data from your HCM system. Our Implementation Team will be gathering additional data from both you and our vendor partners during direct discussions; however, there are things you can do to get a head start.

Here is a [visual overview of where you are after you've signed up](#) and what you can be thinking about while you're waiting for implementation to kick off.

For a deeper dive, you can visit the [Time Bank Online: Implementation Success Resources](#) section of this Resource Center for a checklist of items you can start compiling to share with your IDI Implementation Team after the kick-off call. You'll also be able to view the setup requirements we're going to need from your HCM vendor.

What kind of timeline can I expect from the overall HCM implementation that includes Time Bank Online?

Check out our [Time Bank Online Typical Implementation Timeline](#) which provides a visual of how we fit into your overall HCM implementation project, including length of time ranges for each phase. If the complexity of your solution deviates from this, your IDI sales rep will let you know.

During the project, you will also have access to our project management software with a dashboard which includes milestones and project status updates/warnings. Check out a screenshot of our [Guide CX Project Overview](#).

What kind of support should I expect after Go Live?

No need to worry about being supported once testing is complete and you've gone live. We have an Account Management Team and a Technical Support Team ready to assist you through the life of your relationship with IDI!

Check out [Our Ongoing Support Process](#) web page to learn more.

We also have an ever-growing learning center for self-help available in IDI Resource Center with sections such as [Technical Support and Troubleshooting](#), [What is IDI's Service Level Agreement, or Support SLA?](#), and our [user demonstration videos](#) that will walk you through how to process Time Bank Online.

Already completed your implementation? Check out our [Congratulations on Completing Implementation and Next Steps](#) video!
