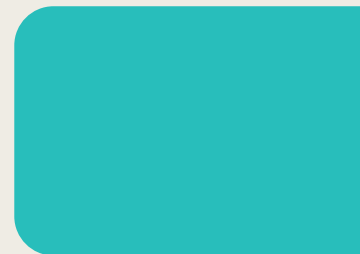




Coming to Function Point?

Frequently Asked Questions
About the First 60 Days



Committed to Your Success

Using Function Point for the first time? Transitioning from a different tool?



We've Got You Covered

At this point you've realized your spreadsheets, sticky notes and Slack chats aren't enough to keep your team organized. Or, maybe you're not happy with your current agency software and you're looking for a change. Either way, you need something new—an upgrade.

If you're afraid of transitioning to a new system because of the investment in time, fear not. At Function Point, we make our software work for you, not the other way around. It's reflected in how we build our product and how we help set up our customers for long-term success.

To ease any concerns you might have, we've outlined some information about our onboarding process to give you a better picture of what to expect; everything from the team you'll be working with, to estimated timelines and practical tips for getting buy-in from your team.

How We Help

Every touchpoint we have with our customers is important to us and we put extra emphasis on your first few months. Onboarding and training form the foundation of our working relationship so we're heavily invested in starting you off on the right foot.

Function Point has trained over 9000 users across the United States, Canada, United Kingdom, Brazil, and Australia. We've figured out the best way to train all kinds of teams—marketing agencies, architecture firms, internal agencies, big teams, boutique teams, organized teams, less than organized teams—likely teams similar to yours. We do everything we can to take the stress out of learning a new system.

So, what can you expect from your onboarding? Function Point provides a personalized consultative approach, customized to your team and business' needs. Our onboarding consists of four phases: discovery, skill development, evaluation and enhancement. Your dedicated Success Manager will work with you through onboarding and beyond to ensure that your Function Point system is built to meet your unique requirements as your company grows.



Frequently Asked Questions

What kind of support does Function Point provide for training?

Every Function Point customer is assigned a dedicated Customer Success Manager who will take your 'Prime,' or main point of contact, through initial training. They will work with you to ensure you and your team are maximizing the value of our product. Non-primers are always welcome to join skill-based training as needed.

Function Point's Customer Success Team works closely with our Product team to ensure customers are up to date with all of our latest features and that feedback is shared through the appropriate channels.

How long does onboarding take?

The majority of teams complete skill-based training sessions within 30-60 days. While some teams take longer, other teams have completed their training in as few as 20 days. Training is set to a flexible schedule, catering to your team's needs and availability.

After training is complete, your dedicated Customer Success Manager will continue to be your main point of contact.

What support do I get after training?

After your skill-based training is complete, your Customer Success Manager will help resolve workflow related questions when they arise, and our Support Team will handle the more technical questions that may come up.

Who should I assign as our 'Prime' or internal Function Point expert?

The best person to be your 'Prime' differs from organization to organization. For agencies, the owner or a dedicated Traffic Manager is often used. For larger internal marketing agencies, the role has often been assigned to someone in Marketing Operations. The individual should know the business structure and workflows well, have the authority to make key decisions, and be able to access company sensitive data. As they will be responsible for training and rolling out the system, they should have the capacity to complete all pre-work and system set-up. Your Customer Success Manager will work with you to determine the best fit for your organization.

What do I do if my 'Prime' or internal Function Point expert quits?

Turnover happens. Your Customer Success Manager will provide different options for retraining, depending on your needs.

Can I bulk upload my contacts and accounts into Function Point?

Nobody likes data entry! Your Customer Success Manager will happily import any data from your spreadsheets, CRM, or previous agency software.

Frequently Asked Questions

I can't get my staff to refill the coffee machine when we run out, how will I get them trained on new software?

Getting buy-in for a new tool can be a challenge. Project deadlines are always around the corner and learning new software won't always be top of mind for your staff. In our experience, there are certain things you can do to greatly improve the uptake of our software.

It's important to establish why you're moving to new agency software. In the initial kickoff meeting, paint a clear picture of how Function Point helps their workflows, makes their day easier and the agency more profitable. Unfamiliar with the benefits? Check out our Product Fact Sheet for a rundown of our most popular features.

Before proper time-tracking, it can be jarring for many of our customers to learn they're losing money on projects. To help encourage staff to track time some agencies have held monthly cash draws for compliant teams, promoted friendly internal competition, and even gone so far as to link accurate time-tracking to individual's bonuses.

In our experience, the trickle-down effect of senior leadership also plays a big role in adoption. If your leaders have bought in, the rest of the company will follow.

What is included in Onboarding?



A Dedicated Customer Success Manager



Free Unlimited Support



Full Implementation Program



Access to Help Centre and Webinars



Customer Testimonials

Hear From Our Customers

“ With over 20 years in the agency business having worked with several different software programs, I can say that Function Point rises to the top in terms of intuitive functionality, implementation and training. The quality of the product is matched by the quality and competence of the Function Point team who helps deliver personalized training and training tools to ensure successful implementation.

Lisa Maksym, Director at Owens Harkey

“ IVY’s experience with Function Point has been nothing short of outstanding in our first months utilizing the system. As an agency with over 17 years and 2000 projects under our belt, there was a concern that migrating to a new software package would be a disruptor to our business flow. This has not been the case whatsoever. In fact, the implementation of Function Point was seamless and, even in its infancy within our agency, we are already seeing improved workflows, visibility into projects, and increased billings as a result. The team at Function Point has gone above and beyond to make this process simple.

Cole Maruk, Business Development & Marketing Manager, IVY Design

“ Overall our experience and journey with Function Point has been amazing! Being based in Australia we were slightly concerned about the onboarding/training process happening remotely, but the team at Function Point made it seamless. We felt so well equipped to deal with using the platform ourselves in day to day agency life almost instantaneously. The platform itself is very intuitive and allows us to have greater visibility over every aspect of a job from workflow through to financial management.

Key to this success was setting everything up correctly from the beginning. The support we received from the team at Function Point was second to none. Nothing is ever a problem and you always finish a call far more educated than when you started and your Customer Success Manager leaves you with a big smile on your face. We cannot thank the team at Function Point enough for all they’ve done for us!

Madeline Dutton, Strategic Business Manager, Jam&Co