Account Cleanup

This service will provide you with a Project Manager to assist you to organize your data within your ClearCompany account. Including deleting old, irrelevant data, adding new data, and changing data to reflect accurately. Your Project Manager will be able to provide you with relevant advice, recommendations, and best practices for different configuration options and also keep you on track with a custom Project Plan. You will also get up to three hours of data entry/cleanup time for us to do some of the heavy lifting.

Benefits	Description
Get more out of your existing investment	Increase efficiency by using the system. Only have the data in your account that is relevant to your process and organization now.
More Meaningful Reports	The cleaner your inputs the cleaner your outputs! If you have a lot of outdated data in your account, that will reflect on your reports. Clean it up, so your reports only tell you relevant, current, meaningful information.
User Clarity	Ensure Hiring Managers only have relevant data points in the drop downs, so they are more likely to select the right answers when they request a job opening. Ensure you have your performance review templates named appropriately, so you know which ones to use next review.

What's Included

This package is tailored to suit your individual needs and organizational challenges. Talk to your Account Manager or Customer Success Manager. Examples of data we can help you organize are users, departments, offices, roles, requisition templates, open jobs, interview scorecards, offer letter templates, onboarding packet templates, performance templates, performance workflows, or goal completion.

Step	Description	Typical Time Frame
Dedicated Project Manager	You will be provided with an experienced Implementation Manager to guide and provide advice for a duration of up to four weeks on your data cleanup project.	
Custom Project Plan	Your Implementation Manager will provide you with a customized project plan based on your data cleanup needs. This plan will have tasks, timelines, and helpful links to guide you through the process of cleaning your data.	
Cleanup Project Kickoff	On this call, review your pain points, goals, and timeline. Then, we will present a project plan with an overview of the supporting documentation. The next steps will depend on your individual needs!	Week 1, 1-Hour Call

Up to Four Meetings Over a Set Amount of Time	You will have up to four calls over four weeks to cover the initiatives of the cleanup project. In these calls, you will discuss: • Issues with your current set-up • Best practices and other options for data setup • The steps required for each cleanup task • Where you are at in the project and what's coming up next in the project • How you would like to allocate your three hours of data assistant time?	Week 2-4, 1-hour call weekly
User and Permission Audit	Your implementation Manager will run a report from your account to list all of your active users and their permissions. You will adjust the report accordingly changing permissions and provide it back to your Implementation Manager to update in your account.	Week 1-2
Data Work	Included in this package is up to 3 hours of data cleanup time. This means that if you have a particularly big data cleanup task or lots of small things, our data assistants can help to do the heavy lifting. We will gather from you the specifics on what you need to be done and our data assistants will work in your account for up to three hours over a set amount of time to do the data cleanup. Additional hours can be purchased, if needed.	Week 1-4, 3 hours
Project Wrap-Up Call	In this call, your Implementation Manager will provide you with tips and tricks for keeping your account up-to-date on an ongoing basis.	Week 4, 1 Hour call