

2025 Initiatives

Investments in Customer Experience



perfect**serve** SUMMIT

Speaker



Amanda Brooks,
Vice President,
Customer Experience

2025 Initiatives

Unite Customer Facing Teams

- Improved communication and customer experience
- Continued focus on deepening multi-product knowledge

Customer Communication

- Improved product release communication processes
- Consistent real-time communication of service impacts via Statuspage

Invest in Customer Experience Education

- Established dedicated resources
- Invested in tooling to support content creation

Creation of PerfectServe University

- Interactive product e-learning and certification courses
- Role-based, self-learning for administrators and end users

Register for PerfectServe University



All PerfectServe University courses are available upon registration.

Courses organized by:

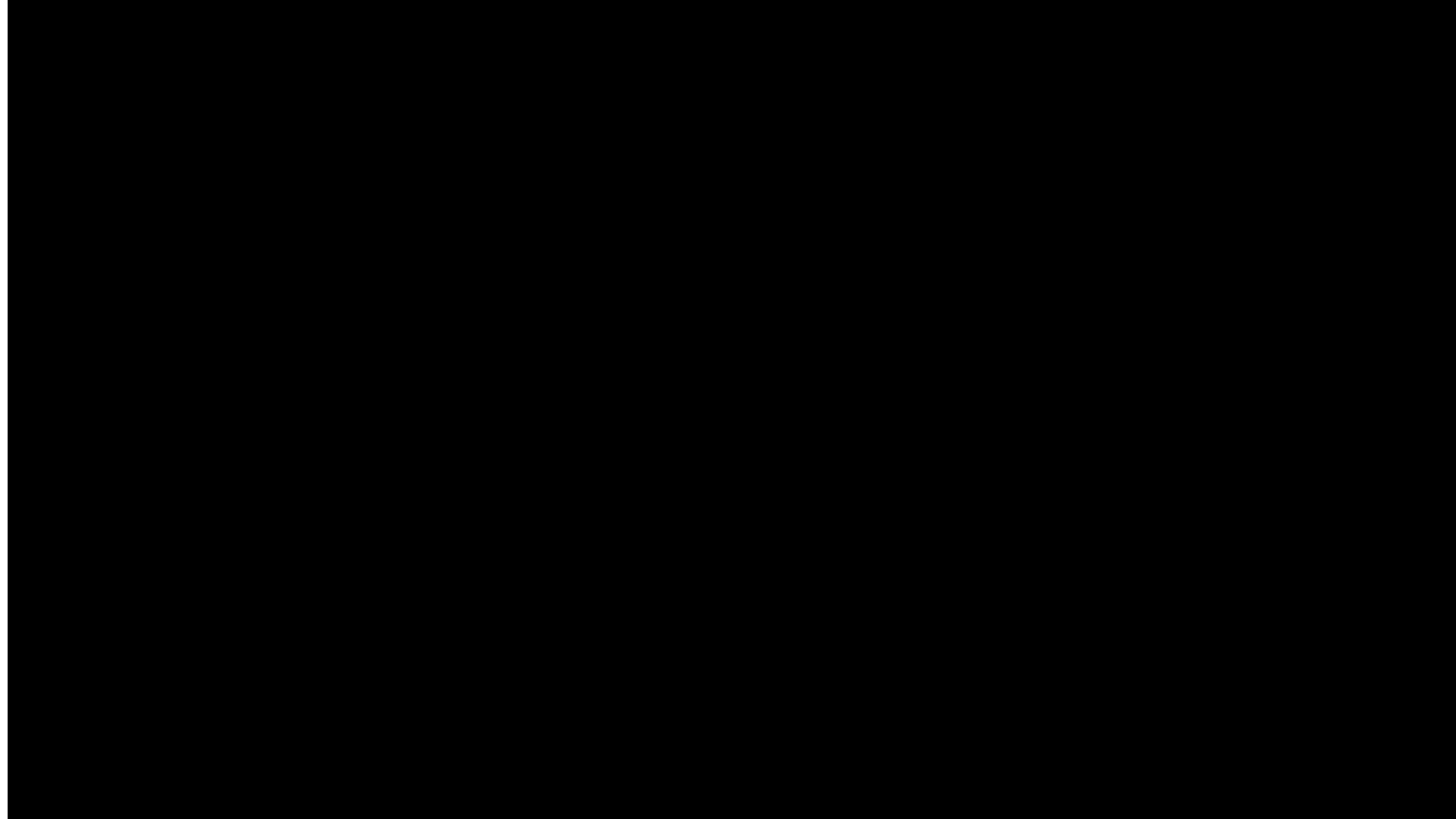
- Products (e.g., PerfectServe, Lighting Bolt, Clinical Collaboration, Operator Console, PFC)
- Course Content: Administrator Fundamentals, Advanced Administrator, End User Fundamentals, and more!
- Learning Pathways*



Use the QR code to register

**As new courses are added, Learning Pathways will be built to help learners easily navigate content by role and product.*

PerfectServe Fundamentals



Client Education

Guide to Success



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Agenda

Onboarding New Users

Continuous Education

Staying Informed

Customizing Your Education

PerfectServe University

Onboarding New Users

Help New Users Get Started!

Why Onboarding Matters

- Ensures users understand how to use PerfectServe tools from day one
- Reduces confusion and support tickets
- Promotes consistent workflows across teams
- Builds confidence in mobile app usage, escalation paths, and communication tools

Best Practices for Onboarding

- Provide role-based content:
 - **Admins:** Fundamentals course, CSP walkthrough, escalation workflows
 - **End Users:** Mobile app basics, messaging, schedule navigation
- Include:
 - First-time login instructions
 - Quick reference guides (PDFs)
 - Introductory videos (MP4 or LMS)
 - Contact info for internal champions or PerfectServe Support
- Recommend assigning onboarding content during:
 - New hire orientation
 - Role transitions
 - Department onboarding sessions

Who's Responsible & How to Deliver

Who Provides Onboarding Content?

- **PerfectServe** provides general education materials:
 - PDFs, videos, SCORM packages, editable templates
- **Clients** are responsible for:
 - Distributing content to new users
 - Uploading SCORM packages to their LMS
 - Customizing materials if needed (e.g., internal workflows, alert naming)

How to Deliver Onboarding Content

- Use your organization's **LMS** to assign SCORM packages
- Share **MP4 videos** via email or internal portals
- Provide **PDF guides** during orientation or via intranet
- Customize editable materials (PowerPoint, Word) to reflect internal processes

★ **To request onboarding materials**, contact your PerfectServe representative or Support team.

📁 PDF versions are also available in the **Customer Portal**.

Continuous Education

Encourage Ongoing Learning

Why It Matters

- Reinforces product knowledge and confidence
- Reduces support tickets and escalations
- Keeps staff aligned with new features and workflows
- Supports compliance and internal training goals

Recommended Cadence for PerfectServe Clients

- **Annually:** Required training for compliance and core product usage
- **Quarterly (Recommended):** Refresher videos on mobile app usage, web usage, and admin tools.
 - Ideal for high-turnover roles or frequently used tools
- **Biannual Updates:** Updates on new features, enhancements, and workflow changes
- **Annual Deep Dives:** After major product updates or workflow changes

How to Deliver Ongoing Learning

★ Tip: Assign refresher content during onboarding, quarterly check-ins, or after major product updates.

Training Formats

- Refresher videos (MP4 format)
- SCORM packages for LMS upload

How to Get Content

- Contact your **PerfectServe team or Support** to request:
 - SCORM packages
 - Editable PowerPoint or Word documents
 - Refresher videos

Who's Responsible

- **PerfectServe** provides general education content
- **Clients** are responsible for:
 - Uploading SCORM packages to their LMS
 - Creating customized content

Customer Portal

- Access
 - New content and updates
 - Quick reference guides
 - Support links & documentation



**Stay
Informed**

Keep Your Admins & Users Informed

Why It Matters

- Keeping your team informed ensures:
- Faster adoption of new features
- Fewer support issues
- Better alignment with product updates
- Confidence in using PerfectServe tools

Who Should Stay Informed?

- **IT & Application Admins, Key Clinical Stakeholders, and other key admins**
- Anyone responsible for workflows, escalation paths, or onboarding

Learn more about Statuspage [here](#)

How to Stay Up to Date

Enroll in Communications

- Receive new feature announcements, training invites, and best practices
- Contact your PerfectServe rep to confirm or update your contact list

Statuspage Alerts

- Get real-time system status updates and maintenance notifications
- Ideal for IT and Admin teams

Webinars

- Attend live sessions for new features and best practices
- Replays available for on-demand viewing

Customer Portal

- Access:
 - New training content
 - Release notes
 - Webinar registration links
 - Replay recordings
 - Downloadable PDFs

Customizing Your Education

When & Why to Customize

Why Customize PerfectServe Education?

- Align training with your **internal workflows**
- Reinforce **organization-specific terminology**
- Improve staff confidence and adoption
- Ensure compliance with **clinical protocols** and internal policies

When Should You Customize example?

- When your team uses **specialized alerts** like:
 - **Code Blue, STEMI, Stroke**, etc.
- Our general content shows how to send alerts—**you can add your own routing logic, naming conventions, and escalation steps.**
- When onboarding staff with **internal SOPs** that go beyond product functionality

How to Customize & Who's Responsible

Who Owns Customization?

- **PerfectServe** provides general education content (courses, guides, videos)
- **Clients** are responsible for customizing content to reflect their internal processes

How to Customize Content

- Contact your **PerfectServe representative or Support team** to request:
 - Editable **PowerPoint** or **Word** versions of training materials
 - Templates for walkthroughs or quick guides
- Use these materials to:
 - Add screenshots or workflow diagrams
 - Insert internal terminology or escalation steps
 - Create role-specific guides for your teams

*Note: PDF versions of all general education content are available in the **Customer Portal** or by contacting your PerfectServe team.*

PerfectServe University

Welcome PerfectServe University!

PerfectServe University is your go-to hub for role-based, self-paced learning designed to support both new and experienced users!

Cost: NOTHING! It is free to PerfectServe clients.

Current Courses Available:

- PerfectServe Administrator Fundamentals
- Lightning Bolt Schedule Administrator Fundamentals

Coming Soon

- Clinical Collaboration & Operator Console Administrator Fundamentals
- Advanced Administrator Courses
- End User Fundamentals Courses

**All courses available in SCORM packages for clients*

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Thank you!



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