



ThoughtTrace™

Document Understanding

Customer Success Overview

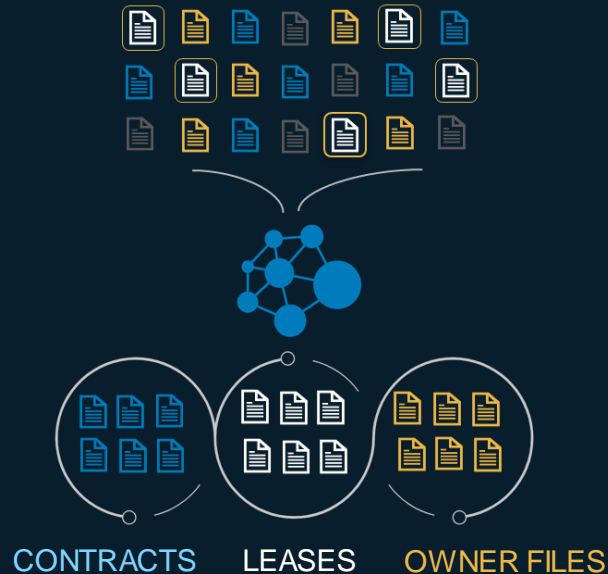
Our Mission

ThoughtTrace™ exists to empower people and companies to greater insight and creativity through better access to their most challenging information.

Document Understanding

MANAGE

Automated document separation, classification, and management



ANALYZE

Automated identification, interpretation, and extraction of critical clauses & data elements



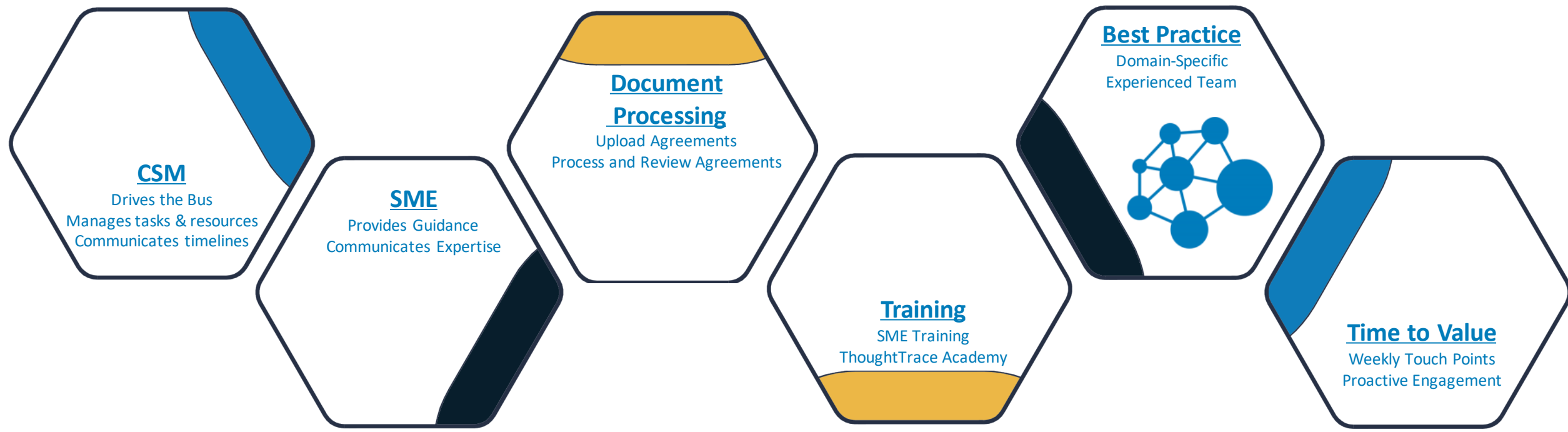
CONNECT

Point and Click integration to other systems via ThoughtTrace Connect or REST API





Customer Success – the “How”



Game Plan – Immediate

- Create Workspace – 1 day turnaround

- Kickoff

 - Attendees:

 - ThoughtTrace CSM, SME, Account Manager

 - Customer Champion, Key Users, IT Lead

 - Agenda:

 - Introduce customer to their ThoughtTrace Onboarding Team

 - Discuss First Use Case details & additional priorities

 - High-level overview of Onboarding process & resources

 - Identify next steps for First Use Case

Game Plan – First Value

- ❑ Document Upload – with assistance from ThoughtTrace
 - ❑ First upload will leverage the Bulk Upload Utility – Customer must have documents stored on a mapped drive as well as unique identifier (ex., Agreement Number, Contract ID, Document ID, etc) to map to the documents
 - ❑ Uploads via API can subsequently be setup (if API/Automate has been licensed)

- ❑ Training – ThoughtTrace Academy, Live Workshops
 - ❑ ThoughtTrace Basics/Admin Modules
 - ❑ 1-1 Training with SMEs as needed

- ❑ First Use Case – Review, Document, and Plan
 - ❑ Lead with Results – ThoughtTrace SMEs to provide and train to the initial project results

Game Plan – Ongoing

Recurring Touch Points – Weekly for first 90 days to discuss:

- Current Projects/Needs
- ThoughtTrace Updates
- Support Requests & Feedback
- Brainstorm new use cases

Process Refinement & New Use Case Identification

Advanced User Training

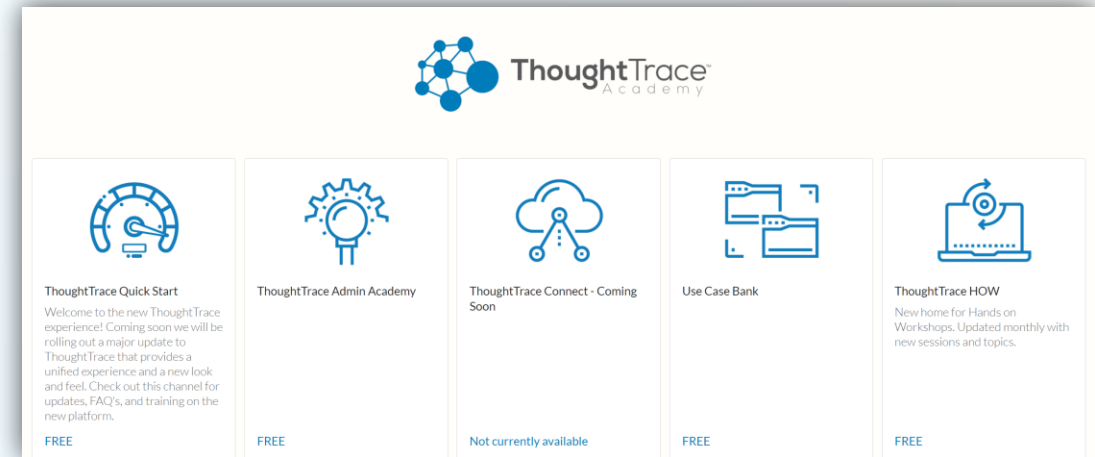
Resources @ ThoughtTrace

Learn

[Jump into ThoughtTrace Academy, our online learning portal](#)

[Check out the Community Knowledge Base & Product Roadmap on the ThoughtTrace Community site](#)

[Start your learning journey with the ThoughtTrace Quick Start Course](#)



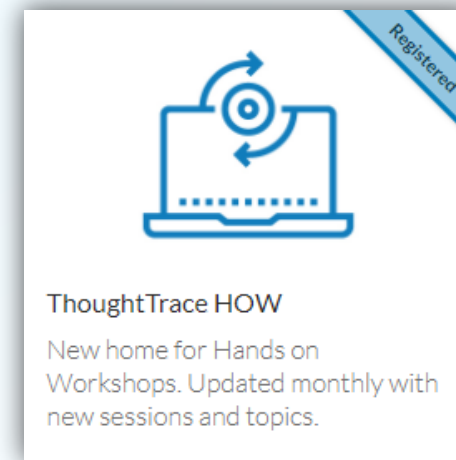
The screenshot shows the ThoughtTrace Academy homepage with the following resources:

Resource Name	Description	Availability
ThoughtTrace Quick Start	Welcome to the new ThoughtTrace experience! Coming soon we will be rolling out a major update to ThoughtTrace that provides a unified experience and a new look and feel. Check out this channel for updates, FAQ's, and training on the new platform.	FREE
ThoughtTrace Admin Academy		FREE
ThoughtTrace Connect - Coming Soon		Not currently available
Use Case Bank		FREE
ThoughtTrace HOW	New home for Hands on Workshops. Updated monthly with new sessions and topics.	FREE

Action

Register for the upcoming Hands on Workshops (HOW):
[ThoughtTrace for Beginners](#)
[Advanced Search & Reporting](#)

[Admins to review Bulk Upload Guide](#)



The card features a laptop icon with a circular arrow, indicating a workshop or training session. A blue diagonal banner in the top right corner says "Registered".

ThoughtTrace HOW
New home for Hands on Workshops. Updated monthly with new sessions and topics.



ThoughtTrace™

Document Understanding

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