



The proven solution  
for implementing  
TeamMate

# *TeamMate Professional & Technical Services*

At TeamMate, we pride ourselves not only on our industry-leading software, but also on our dedicated team of technical and business consultants, all of whom are focused solely on helping you use your TeamMate software most effectively in support of your ongoing business objectives.

TeamMate's consulting team is composed of professionals with all of the expertise necessary for a successful implementation of your TeamMate software.

- Our Professional Services team consists of experts from the Internal Audit and Compliance professions, and many hold certifications in the field, including CIA, CFE, CCSA, and CRMA designations.
- Our Technical Services team consists of technical experts in both cloud-based and on-premise installations, with a reputation for maintaining unparalleled system uptime.

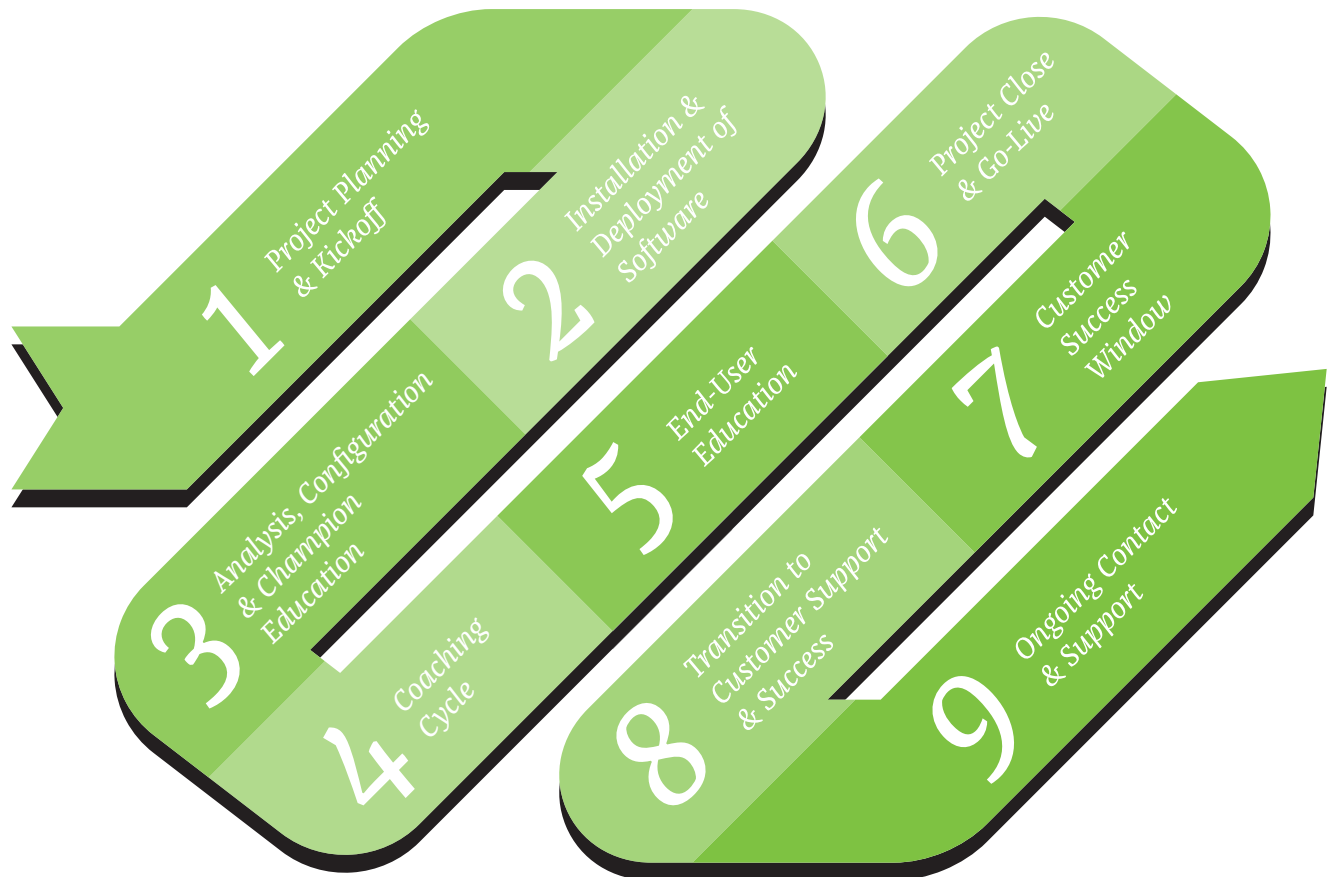
This combination of skills works to ensure that you have a high-performing TeamMate system configured to your specific needs and objectives, wherever and whenever your staff members perform their work.

TeamMate's Professional and Technical Services teams will implement your system using our proven project methodology. You will work with a closely-aligned group of our consulting experts who will coordinate with your internal teams to implement a system that not only meets your needs, but does so on time and on budget.

## Our step-by-step approach

TeamMate's project-based implementation methodology ensures successful on-time and on-budget customer implementations. Based on proven methods from the Project Management Institute, our team-based approach combines the knowledge of technical, business, educational, and project experts to rapidly convert your unique business needs into a fully-implemented TeamMate solution. This process includes several major steps:

- [Project Planning](#) determines the project schedule, resource requirements, and business objectives of your TeamMate implementation
- [Installation](#) provides you with either a hosted or on-premise system, in both test and production modes
- [The Analysis and Configuration Workshop](#), led by our credentialed internal audit or compliance experts, designs the system to meet your workflow, terminology, and audit life cycle requirements
- [The Coaching Cycle](#) gives you the opportunity to work with the system prior to [Go-Live](#) while under the guidance of our consulting team
- [End-User Education](#) provides a custom training experience for all your users
- [The Customer Success Window](#) is a unique offering, during which you will have a dedicated resource to help you as you get started using your new or upgraded system
- And finally, our [Transition](#) experience will formally introduce you to the extended support and success teams that will work with you over your lifetime as a TeamMate customer through [Ongoing Contact & Support](#)



## Technical and Consulting Services

In addition to our full, project-based implementation program, TeamMate's Professional and Technical Services teams also offer the following consulting services:

### Installation and Hosting Services

Our technical team provides complete onsite or hosted installation of the TeamMate Suite or for individual suite components, along with customized one-on-one training for your TeamMate "IT Champion."

### "Trusted Advisor" Coaching Services

Our certified Internal Audit and Compliance experts are unique to the industry, with practical audit and TeamMate experience. They are available at any time to review your TeamMate system and to provide a "best practices" review of your audit processes to ensure you are meeting your team's goals and objectives.

### On-site and Virtual Custom Training Services

Both during your initial implementation and over time (as new staff join your organization, for example), our certified team can provide you with both the end-user and "Champion" training that will help you optimize your efficiencies and practices. We also have "Train-the-Trainer" options for larger organizations, where we equip you with the knowledge and materials you need to roll out your TeamMate solution wherever your internal auditing responsibilities may reside.

### Upgrade and Migration Services

Keeping current with our latest versions enables our customers to capitalize on the capabilities, efficiencies, and ongoing functional improvements TeamMate consistently brings to its Audit Management and Compliance Management solutions. Both our Professional and Technical Services teams can assist you in upgrading to our latest version, and in providing training on the incremental changes the newest versions provide.

### Custom Reporting Services

Our Professional and Technical Services team can assist you in scoping custom reports, and then either train you on how to build them yourself or build them for you as a custom service. These reports can be specific to your electronic working papers module or can be designed to combine data from a variety of the system's functional components.

### TeamMate University Public Training Courses

TeamMate's certified professionals also provide group courses for our software, held around the world, that cover all of the key Champion and end-user capabilities of our flagship audit management software.

### TeamMate User Forum

Our annual TeamMate User Forums—held in multiple locations around the world—have become a must-attend event for thousands of TeamMate customers looking to learn about the latest TeamMate has to offer and build their knowledge of TeamMate's existing products and services. With more than 50 sessions covering both industry and technical topics, the User Forums have long been a great place to send staff members eager to learn more and network with other TeamMate users.

### Continuing Professional Education (CPE) Credit

As one of the largest providers of Continuing Professional Education (CPE) Credits in the audit world, TeamMate's Professional and Technical Services offerings help you and your staff maintain your own vital credentials. Participants in our sessions earn these credits while attending any of our consulting or training sessions, with one credit earned for each consulting or training hour completed.



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