You just signed on with Omnitrack.
What happens next?

A step-by-step guide to what you can expect in your Omnitrack implementation process

As you begin your Omnitrack journey to manage your **conflicts of interest compliance,** you'll be guided through the process by our phenomenal support and implementation team. Clients consistently tell us our boutique level of service is the key to making Omnitrack work. Get to know your team who'll be working with you every step of the way.

Emily Jaffe
Emily is the head of Omnitrack support and implementation

R'nana Rapp-Goldenhersh
R'nana is the head of integration

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We offer a boutique level of service, which means that, at the end of the day, you're going to get a better result

Emily

Map out the process

We work with you to identify the full end-to-end process by understanding your current process and procedures.

A graphical map of the end-to-end workflows and integration points.

> Mapping is working with the client to really understand what is the process currently, what are the pain points and how we are going to build a better process in the future.

R'nana

Create content

We help you develop form content so you have the right questions to ask and get to the data you'll need.

A final set of questions ready to be built in Omnitrack.

> There are usually a few ways to do the form content but the client makes the decisions on the form. We help using best practices, based on what our other clients are doing.

R'nana

Design forms

We offer you a set of pre-built forms. You review, revise or build your own.

Complete forms accurately reflecting your process.

> When you actually go into the form and review it and get the feeling of what your end users will feel, then you can make some changes. After that, once the form is 100 percent, we go in and make the form automation.

R'nana

Customisation and automation

> **Part of our role in support is to advocate for the client. So it could be that there's something that could totally benefit them and we will push to get it developed.**
>
> **Emily**

We will create custom emails and statuses and set automated notifications and reminders.

A customised and fully automated experience.

Integration

We integrate Omnitrack with your existing systems and set up user roles and permissions.

A conflicts of interest solution that "talks" to the whole company.

> **Users like that they're communicating with our system. The public API integration is done by the client's IT team and we're giving them the platform to do it.**
>
> **R'nana**

Reporting

> **We always want the client to be happy. One company mentioned that it would be helpful if the reports could be filtered out by calendar date and we said, that's a really good idea. So we implemented it.**
>
> **Emily**

We will help you set up your reporting process, based on your requirements.

A streamlined way to generate reports.

Data

We will help you prepare and upload your historical data into Omnitrack.

All your data is seamlessly imported into your system.

> A company could already have information about conflicts of interest, sometimes from multiple offices. That can be fed into Omnitrack in a data protection compliant way.

R'nana

> We're training the super users. We also highly suggest to our clients that they do testing so everyone becomes really familiar with it.

Emily

Training

We will provide your users with role-specific training on using Omnitrack.

Your users know how to fully utilise the system.

Launching Omnitrack

We will conduct a pilot launch with a group at your company, make tweaks based upon feedback and then go live with a company-wide launch.

Your company has a conflicts of interest solution that is easy to use, effective and intuitive. Congratulations!

> # "
> # In the implementation plan we put in our timing, how long we think it's going to take us to do the work. But we never dictate that to the client. We are always supporting them.
>
> ## — R'nana —

It's time.
Omnitrack's compliance solution will:

✔ Simplify your know-your-customer process management

✔ Reduce human error

✔ Increase team efficiency

✔ Minimise the risk of non-compliance

✔ Streamline your customer journey