# Quick-Start Process: Consultative Onboarding

## Ensuring Long-Term Success Through Deep Engagement

*Powered By WingSwept*

CMTS
Case Management & Tracking System

FR
FedRAMP

GovRAMP
AUTHORIZED
Software as a Service (SaaS)

GSA Contract Holder
Contract # GS -35F- 0218X

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# Introduction

For agencies adopting CMTS, successful onboarding isn't just about getting started—it's about setting the foundation for long-term efficiency and adaptability. Our Consultative Onboarding Process is designed to ensure agencies gain a deep understanding of CMTS while we develop a comprehensive knowledge of their unique workflows, allowing us to provide informed, ongoing support.

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# Insights from Onboarding Surveys

Agencies transitioning to CMTS have consistently cited these benefits from our consultative approach:

### Easy Configurability

Agencies can tailor workflows to meet operational needs and can make configuration changes on the fly without needing a technical background

### Adaptive Onboarding

A consultative process ensures a thorough understanding of agency-specific challenges and needs with expert guidance.

### Proactive & Responsive Support

Our team actively engages with clients to optimize their case management processes.

*CMTS staff were incredible flexible & responsive to our needs which made onboarding easy*

– VP of Special Investigations

# Consultative Onboarding Framework

## Workflow Discovery

We work closely with your agency to understand your existing processes and case workflows. This ensures CMTS is configured to align with your operational needs, providing a structured and efficient case management system.

## Testing & Refinement

This step includes configuring notifications, document templates, custom fields, and reporting. We ensure these elements are properly defined to streamline case management and improve efficiency.

## Final System Review

A full system walkthrough is conducted to refine workflows, validate data migration, and confirm compliance with reporting requirements. This ensures configurations are in place for a smooth transition.

## System Configuration

We focus on defining user roles and permissions, setting up custom fields and form fields, and ensuring the correct access levels are established. This step lays the foundation for a secure and structured system.

## Optional Configurations

For teams requiring additional setup, we conduct focused sessions on features like Online Intake Service (OIS), data migration, and Single Sign-On (SSO). We work with IT teams to ensure smooth implementation.

## Training & Go-Live

Users receive hands-on training and a complete walkthrough of the fully configured system. The process concludes with a final review and sign-off, ensuring everything is ready for daily use.

# Approach to Implementation

Unlike traditional software support models that rely on ticket-based interactions, CMTS offers a client-focused, consultative approach:

### Deep Process Understanding

We invest time in learning agency operations to ensure sustainable and efficient system usage.

### Agency-Specific Expertise

Our team builds subject-matter expertise in client workflows, allowing for more informed support and recommendations.

### Continuous Optimization

Agencies transitioning from other platforms gain insights into best practices and tailors process improvements, sourced directly from the investigative community.

# Enhancing Communication & Case Tracking

With CMTS, agencies can significantly improve efficiency and collaboration through:

**Automated Workflow Enhancements**

Reducing manual intervention and increasing process automation.

**Centralized Case Oversight**

Providing real-time access to case progress and reducing reliance on email-based communication.

**Process-Driven Recommendations**

Leveraging insights from other agencies to optimize investigative workflows.

# Training as a Strategic Partnership

CMTS training goes beyond system navigation—it is a strategic investment in long-term operational success. Our training approach includes:

## Practical Application of Workflows

Hands-on training tailored to real-world agency scenarios.

## Collaborative Training with Supervisors

Ensuring system training aligns with internal decision-making and agency protocols.

## Flexible Training Structures

Ranging from virtual sessions to in-person, deep-dive workshops.

# The Smarter Way to Begin

## Designed for Long-Term Success
- Ensures agencies develop efficient case management solutions
- Provides personalized support throughout the process

## Dedicated Expert Support
- Work with the same team of experts from start to finish
- Experts gain in-depth knowledge of your agency's operations

## Tailored Guidance & Assistance
- No need to repeatedly explain your workflows
- Professionals who understand your needs from day one

## Commitment to Your Success
- More than just a service provider—we're your partners
- Focused on helping your agency thrive with expert assistance

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