



Service Description

The SaaSy People provides consulting and implementation services to help businesses effectively leverage the monday.com platform. This includes:

- **Customization:** Tailoring monday.com boards, workflows, automations, and integrations to align with specific business processes.
- **Training:** Delivering user training and best practices to ensure successful adoption and ongoing use of monday.com.
- **Strategic Guidance:** Advising on maximizing monday.com's potential within the organization for greater efficiency, collaboration, and data-driven decision-making.

Technical Requirements

- **Client-Side:**
 - A modern web browser (Chrome, Firefox, Edge, Safari)
 - Stable internet connection
- **The SaaSy People Responsibility:**
 - Access to client's monday.com account with appropriate permissions.

Data Backup, Restore, and Disaster Recovery

- **monday.com's Responsibility:** monday.com, as the SaaS platform provider, handles all standard data backup and disaster recovery. Refer to their documentation for specific policies (<https://support.monday.com/>)
- **The SaaSy People's Responsibility**
 - **Configuration Backups:** Before major customizations, we will export copies of relevant board structures and automations for safekeeping.
 - **Collaboration:** In the event of a disaster, we will work with the client and monday.com support to restore configurations as needed.

Onboarding and Offboarding

- **Onboarding**
 - **Discovery:** Initial meetings to understand client needs, goals, and existing processes.
 - **Planning:** Development of a customised monday.com implementation plan.
 - **Execution:** Phased setup, configuration, integration, and data migration.
 - **Training:** Tailored sessions for relevant users and administrators.

- **Offboarding**
 - **Documentation Transfer:** Providing comprehensive documentation of all customizations.
 - **Knowledge Transfer Session:** A review session for client IT teams or administrators.
 - **Availability:** Limited post-offboarding email support for a defined period (e.g., 30 days).

Service Constraints

- **Maintenance Windows:** Major changes may be scheduled during agreed-upon maintenance windows to minimise disruption (e.g., weekends or off-hours).
- **Customization Limits:** Customization will adhere to monday.com's best practices and API limitations. We will advise if client requests fall outside those boundaries.

Service Levels

- **Availability:** Consulting services available Monday to Friday, 8am to 10pm GMT.
- **Support Hours:** Email, phone and live chat support provided during business hours, with a target initial response time of 24 hours.
- **Performance:** monday.com performance is primarily dependent on the platform itself. We will optimise configurations for the best possible user experience.

After Sales Support

- **Follow-up:** Scheduled check-ins post-implementation to assess satisfaction and address issues.
- **Additional Services:** Available for hourly consulting or retainer-based support for ongoing needs.

Outage and Maintenance Management

- **monday.com Outages:** We will share monday.com's status page with clients
- **Client-side Outages:** We can troubleshoot client-specific network issues upon request.

Hosting Options and Locations

- monday.com is a cloud-based SaaS platform. Data is hosted by monday.com in their secure data centres (refer to their documentation for locations).

Access to Data (Upon Exit)

- Client retains full ownership of their monday.com data. Exports can be provided at any time upon request.

Security

- We adhere to monday.com's security guidelines. We will not access or store sensitive client data outside the monday.com platform.