



# SIMTREE START UP PROCESS

## Part 1:

## BASIC SETTINGS

- Set up Users
- Add Employees
- Data imports
- Call groups/Skills set up
- **Correct Forecast**

## Part 2:

## ADVANCED SETTINGS AND SCHEDULING

- Employee schedule settings and skills
  - Task types and Break rules Settings
  - Forecast settings
- **Correct Schedules and Target**

### Part 3:

## ADHERENCE AND PAYMENT REPORTS (OPTIONAL)

- Agent events import and Employee Switch IDs
  - Adherence rules
  - Agreements
- **Correct Agent adherence and Payroll reports**

## Part 4:

## PUBLISHING

- Employee app logins and settings
- Final touches
- **First Published Schedule**

## Part 5:

### 3-MONTH FOLLOW-UP

- Discuss experience
- Identify improvements
- Ensure Customer Satisfaction