paperlessPARTS

Implementation & Onboarding with Paperless Parts

Change management is hard. We're here to help.

Every day we hear from manufacturers about software companies forcing them to change how they work to fit their products. We believe this is wrong; there is no "one size fits all" workflow for a custom part manufacturing business, so we built our platform with the flexibility to drive real results.

At Paperless Parts, we know that successful technology is only as good as a successful implementation. Our proven implementation process is backed by a team of experts who take the time to understand your unique goals:

Your Paperless Onboarding Team

Our people are our greatest asset—and yours. Partnering with Paperless Parts means adding 140+ team members to your corner, 45 of whom are dedicated to customer success and onboarding, whose manufacturing knowledge runs vast and deep. Our Customer Experience team is 100% U.S. based and dedicated to supporting you not only with implementation and change management, but with ongoing support and proactive training to help you maximize long-term value.

Implementation Project Manager
Responsible for overall leadership of a project

Solutions Architect
Owns the overall solution & solution design

Technical Implementation Specialist (TIS)
Responsible for provision & hands-on configuration

Services Engineer (SE)
Responsible for custom solutions and integrations

Product Trainer
Provides tailored education & training to key administrators & end users of the platform

Customer Support
Ongoing support for customers

Customer Success Manager
Trusted advisor & consultant on platform & features

"I've never experienced this level of customer service from other software companies. They built an excellent product, and it would be easy for them to sit back, relax, sell, and scale-up. But they don't – they are always improving, releasing updates, and taking suggestions from their customers."

Jonathon Friedl
Co-Founder and Production Manager
Black Mountain Manufacturing

Time Commitment

As the saying goes, you get out what you put in. The typical onboarding requires a customer commitment of 2-4 hours per week per user for meetings with your onboarding team, as well as 2-4 for "homework" outside of our sessions. We understand that you have a business to run and time is your precious resource, so we strive to make these sessions as productive and efficient as possible.

Who Needs to Be Involved?

Your team that's involved in the onboarding process will depend on your specific shop needs.

Executive Sponsor: This is typically the person accountable for ensuring your investment in Paperless Parts delivers the ROI you were expecting when you signed. Their primary role is to ensure that the right internal resources are committed to a successful implementation.
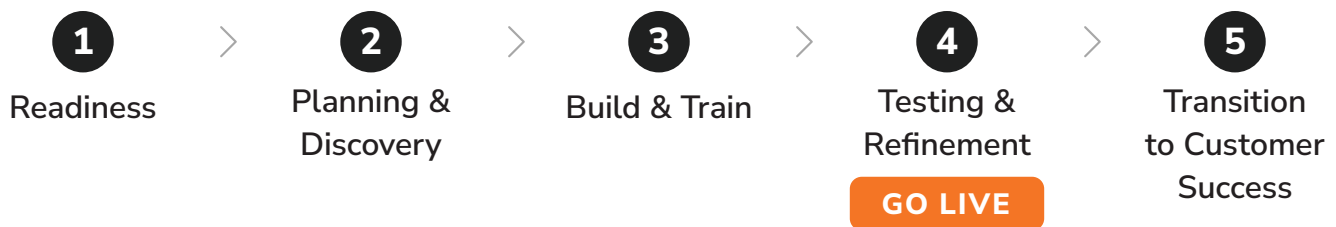
Estimating Team: These are the day-to-day users of the software that will need to be trained on the ins and outs of the platform.

IT/Technical Sponsor: Depending on your business' size and what other systems in your tech stack Paperless Parts will be integrated with, you may benefit from assigning an IT/Technical Sponsor to be part of the onboarding project from start to finish.

Other Users: Estimating is a team sport, and Paperless Parts has plenty of functionality to help sales, administrative staff, and other users streamline their day-to-day job. While those teammates might not be required for the full onboarding process, closer to launch date, your Project Manager will work on a training schedule to ensure everyone has the resources they need to get the most value out of Paperless Parts.

Implementation Phases

While many software implementations can take months or years to complete, Paperless Parts starts adding value in weeks, with many of our customers taking advantage of certain features on the first day of project kickoff. Projects typically span over 6–12 weeks, and while schedules could be extended if your project includes an integration, our goal is to have you quoting in Paperless Parts ~8 weeks from contract signing.

1 Readiness > **2** Planning & Discovery > **3** Build & Train > **4** Testing & Refinement GO LIVE > **5** Transition to Customer Success

Implementation Phases continued

PHASE 1
Readiness

This is where we hit the ground running. Paperless Parts will gather all assets collected during the sales process, while you complete a few checklists that help us determine the most efficient way to implement the software.

PHASE 2
Planning & Discovery

The purpose of this phase is to help us align on KPIs and timeline. This is when Paperless Parts analyzes your existing quoting process, including any ERP or CRM integration behaviors. Your role here is to align your team on what Paperless Parts is building, involve any necessary parties, and prioritize competing projects.

PHASE 3
Build & Train

The building phase is where we actually configure Paperless Parts to behave the way you need to in order to reflect your team's quoting strategy. For example, we'll load your work centers, set your default operations, and build your materials library. This phase is also when we begin training your team on how to use Paperless Parts to respond to quotes.

PHASE 4
Testing & Refinement

Our goal in this phase is to drive as much automation as possible. This is when our team is refining the platform based on user testing, and taking your team's tribal knowledge to test outputs against your current system. In the meantime, your team is getting other departments (e.g. purchasing, sales, accounting) trained up on Paperless Parts to maximize collaboration readiness. The end of this phase is marked by a full transition and go-live to Paperless Parts.

PHASE 5
Transition to Customer Success & Support

Quoting is time sensitive, so our team is always standing by to make sure we're never holding up a hot RFQ. While your Implementation Team will always be there if you need them, we have a full-time support desk for all of our customers; and unlike other software providers you may have worked with in the past, our typical response time is <30 minutes.

In addition, depending on your subscription level with Paperless Parts, you will have access to a dedicated Customer Success Manager (CSM), who will meet with you regularly to ensure you're hitting the goals outlined at the start of the partnership.

Paperless Parts' POWER user conference, May 2025

You will also have access to customer training events and resources, including but not limited to: a robust Knowledge Base complete with help documentation and videos, regular "Power Lunch" training webinars with our product experts, monthly newsletters, our annual customer user conference (POWER), regional best practice workshops, a LinkedIn user group, and more.

A Personalized Partnership

While digital communication is essential, we never underestimate the value of face-to-face interactions. On-site visits allow us to accomplish more in just two days than what could take months of remote communication. We can collaborate in real-time, and these visits also help forge strong and lasting relationships between our teams and truly align our goals. If you're interested in having our team visit your shop, don't hesitate to ask!

Whether you need assistance in training, finance, or any other area, we're with you every step of the onboarding process and beyond. Embracing technology and overcoming associated fears is no small feat, but you don't have to face the journey alone.

Visit our library of 50 real customer case studies who have driven real results with Paperless Parts at
paperlessparts.com/case-studies

"Kudos to the Paperless Parts team. Our onboarding experience was a very quick and highly-supported process. We're still closely supported by the team today, which is a big deal for us because the folks on our team can make adjustments as they see fit. That support is huge."

Tim Schneider
VP of Operations
One Source Manufacturing Technology (OSM)