Pepper Flow®

Welcome to Office Hours

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Protocols for Today

- ✓ Using demo environments
- ✓ Customer-specific questions may warrant a follow-on discussion
- ✓ Parking lot for any follow-ups needed outside of this session and feature requests
- ✓ Submit questions via Zoom Q&A or use Raise Hand and you will be unmuted
- ✓ Poll participation is optional, but encouraged
- ✓ Recording will be shared afterwards

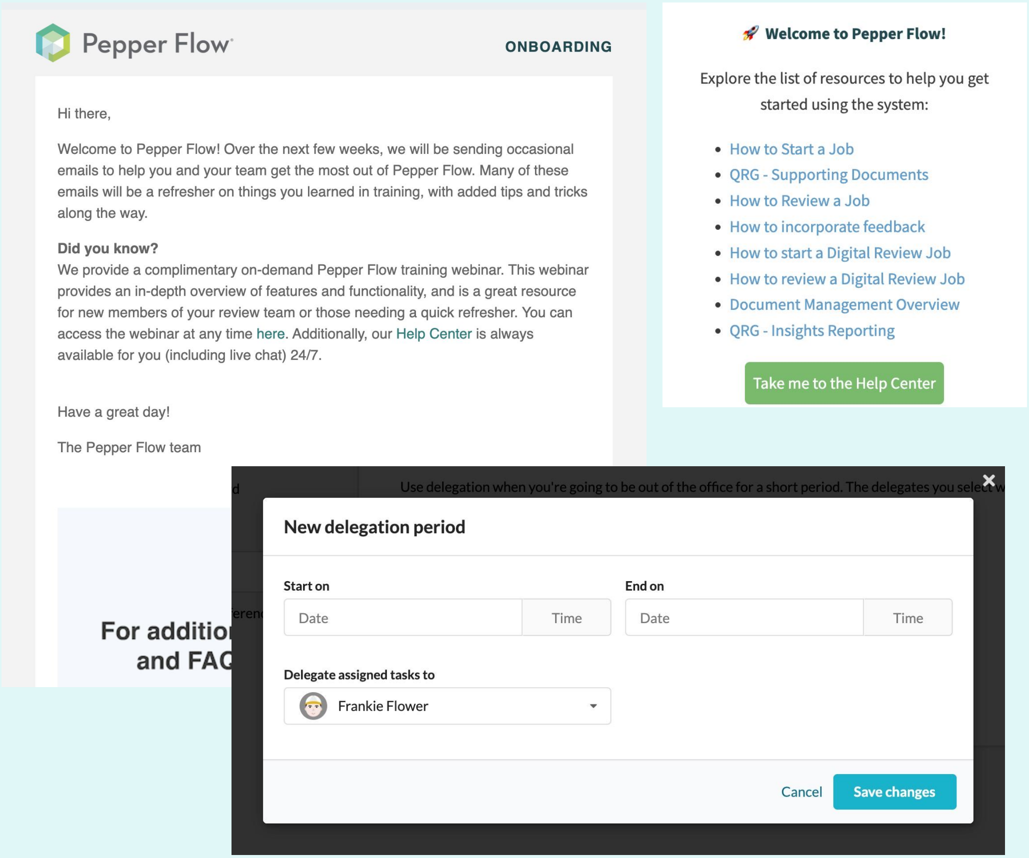
Today's Format

1. Capability showcase by Vodori - 20 mins
2. Pre-submitted questions - 10 mins
3. Open Q&A - 20 mins
4. Looking ahead - 5 mins

Onboarding & Offboarding Users

When you have users arriving or departing, it's important to follow some key onboarding and offboarding procedures to:

- **Set users up for success in Pepper Flow**
- **Reduce interruptions to daily tasks**
- **Ease transition of content and responsibility ownership**



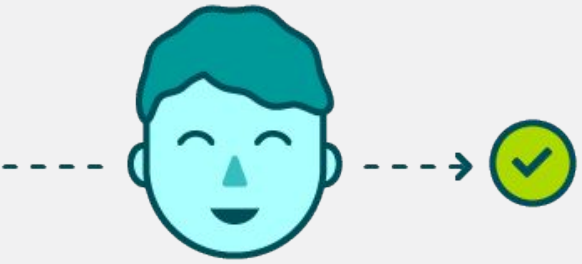
Best practice recommendations: Onboarding

System Admin:

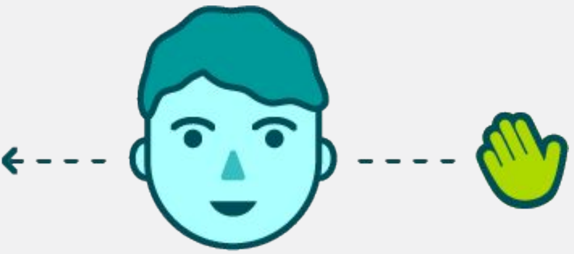
- Share **recorded user training**
- Provide internal process training materials and SOP
- Enable **user access** in Pepper Flow
- Share the login link and **reset password instructions**

System Automated:

- Enrolled in a 10-week sequence of instructional onboarding emails
- Served ‘getting started’ help content upon login



Best practice recommendations: Offboarding



System Admin/ Coordinator:

- Transition material ownership with **update content owner**
- **Deactivate** the user
- **Reassign reviews** as necessary

Departing user:

- **Set up a delegation period** starting the week before your departure, ending one - two weeks after your last day

Questions Pre-Submitted at Registration

1. How to achieve a default sort / filters in the Library & Jobs Board
2. Best next steps when expiration is approaching
3. Ways to understand changes made
4. Ways to ease review

Vodori

Open Q&A

NEW! Salesforce Integration for Pepper Flow

Available early October

Pepper Flow

You review and approve content in Pepper Flow

salesforce

Approved content is accessible in Salesforce

- Content is available in context of a sales rep or MSL's current deals or territory
- Sales reps and MSLs can share approved content with contacts as needed
- Key information supplied in Pepper Flow is visible, such as target audience or intended use

Contact your CSM or System Owner to request more information about our turnkey connector to access Pepper Flow content directly in Salesforce-based CRMs

Looking Ahead

- Recording will be shared after this call
- Next Office Hours is October 20
- Release Notes webinar hosted by our Product team on **October 19th at 9am CDT**

Thank you

Parking Lot

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