

finway Onboarding Premium

The aim of onboarding is to provide you with the best possible support so that you can start working with finway quickly. During onboarding on finway, you will go through at least five steps with your personal contact person in order to integrate finway as efficiently and smoothly as possible into your day-to-day business.

We are dependent on your cooperation in areas such as providing important information and making appointments. Our experience shows that onboarding takes around four weeks with efficient collaboration. If you provide the required information more quickly, onboarding can also be completed more quickly.

Please allocate enough time for your onboarding so that you can also work on your finway implementation and documentation of your process outside of the joint appointments.



Note if you want to use finway cards

In order to use finway cards, you must go through processes to verify your company (KYB & KYC). We will accompany you step by step, and card onboarding takes place in addition to the regular appointments. The duration of card onboarding depends on the complexity of your company structure and the cooperation of all persons involved. Card onboarding comprises at least one 30-minute meeting, in which a person authorized to issue instructions from your company must be present.



The onboarding steps

The meetings in the onboarding process range from 30 to 60 minutes.

- 1
- Kickoff call with your personal contact person (60 minutes)**

We answer open questions and plan the timeline for your onboarding together with you. We also use the appointment to discuss your goals and expectations of finway and, in preparation for the next appointment, go through the upload Excel template that you have already partially completed and answer any questions that arise. We discuss your cost center framework and check whether it can be easily implemented with finway.
- 2
- Data upload & setup call (60 minutes)**

After you have entered your master data in our upload Excel in preparation for this appointment, we will upload it to finway together during the meeting. Beforehand, we will check the upload Excel together so that as many sources of error as possible are eliminated. If you already have the data for the card onboarding together, we can also discuss this here. We also connect your bank and DATEV and set up the first workflows together. After this appointment, you will be able to start using finway.
- 3
- Admin onboarding (60 minutes)**

In the admin onboarding session, we will discuss all the request types available to you as well as the general process for invoice processing in the finway dashboard. We will also give you tips and recommendations for preparing your internal documentation to make it as easy as possible for your colleagues to get started with finway. Please prepare a concept of how you would like to use finway internally or how you would like to restructure the processes.
- 4
- Employee onboarding (45 minutes)**

There is a separate training session for your employees. We ask at least one of your admins to take part in the meeting so that your employees can be made aware of the internal processes. It is essential that you have discussed with us beforehand what your employees need to be aware of. You should also actively include this information in this meeting.
- 5
- Final onboarding call (30 minutes)**

Before you move on to the adoption phase, we discuss potentially outstanding issues and look for a joint solution. After this meeting, all employees involved in onboarding at your company will receive an automated survey regarding their onboarding experience with finway.

Q&A session (optional)

During the onboarding period, you can book an additional 30-minute meeting in addition to the scheduled meetings to clarify your questions.

6

Adoption phase

The adoption phase starts directly after onboarding. It begins as soon as the last onboarding meeting has taken place. In up to 3 monthly meetings, the aim is to support productive use and ensure that your questions are answered quickly and clearly so that you can make the most of finway's potential.