

Tricefy Installation Checklist

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[Tricefy Installation Checklist TIC-01_A8 \(1\).pdf](#) 

There are three main reasons why we use an installation checklist:

- 1) Compliance
- 2) As a work instruction, in other words, a guideline to implement policy and procedure
- 3) To ensure the highest standards of customer service starting with a seamless installation.

You will be asked to submit your installation checklists for audit and evaluation purposes. Installation checklists must be retained by direct sales, distributors, and partners for 5 years in accordance with ISO 13485. Tricefy streamlines clinical workflows and provides quick and easy clinical management solutions. We need to make sure that the installation process reflects this efficiency. Making our customer's lives easier and simpler is at the heart of what we do. Preparation is key and the installation checklist will help ensure we create a positive first impression, encourage our customers to explore the Tricefy platform, and provide outstanding post sales support. Best practice suggests that we structure the pre and post installation process as follows:

1. A pre- installation qualifying call/meeting. To inform the customer of what will be needed during the installation and for you to gather necessary planning information.
2. Guided remote or on-site installation.
3. Introductory Tricefy training so that our customers can get up and running quickly and easily and start to benefit from all of the Tricefy features and benefits.
4. Post installation follow up and support. See more detail and sample scripts below.

The trial period is our window to create customer loyalty, expertise and generate upgrade opportunities.

Below is a series of sample emails that you can further personalize and use to initiate customer touchpoints post-installation. As a best practice, we also recommend that you attach customer success stories to these email communications to help new clients visualize the possibilities of our transformational technology and generate opportunities for package upgrades. Customer success stories can be found in the "We Use Tricefy" folder in the Trice Academy: <https://academy.triceimaging.com/help/we-use-tricefy> You can select and share customer success stories based on your customer interests, such as patients sharing, research, or remote collaboration.

First email after 24-48 hours post installation – Make sure you check the account in Manage

Scenario 1: Successfully up and running:

Dear xxx,

I hope this message finds you well. Thank you for signing up with Tricefy. I am thrilled that we were able to get you started with Tricefy so that you can begin to enjoy the ability to access and share medical images and reports anytime, anywhere from any device quickly and easily. I wanted to check-in with you to see how your first few days as a Tricefy user have been for you and your team? I can see that you are using the system and I want to make sure that you continue to take advantage of Tricefy features and benefits. To supplement your initial training, I have attached some product instructions for sharing/reporting/etc. You can find even more information about Tricefy features, benefits, and use cases through the Tricefy Help Center: <https://www.tricefy.help/help> Attached to this email you will find some customer success stories to show you how Tricefy technology can transform your practice. Please let me know if you have any questions or concerns. I look forward to hearing from you.

Scenario 2: Not successfully using Tricefy (have not yet sent a study or have under 10 studies in their account)

Dear xxx,

I hope this message finds you well. Thank you for signing up with Tricefy. I am thrilled that we were able to get you started with Tricefy so that you begin to enjoy the ability to access and share medical images and reports anytime, anywhere from any device quickly and easily. I wanted to check-in with you to see how your first days as a Tricefy user have been for you and your team? I can see that you

have not uploaded any studies. I would like to arrange a time to speak with you to see how I can support you and your team in taking full advantage of all Tricefy features and benefits. To supplement your initial training, I have attached some product instructions for sharing/reporting/etc. You can find even more information about Tricefy features, benefits, and use cases through the Tricefy Help Center: <https://www.tricefy.help/help> Attached to this email you will find some customer success stories to show you how Tricefy technology can transform your practice. I am happy to provide an additional training session for you and your team and to address any questions or concerns you may have. I look forward to hearing from you.

Second email after 1-2 week – Make sure you check the account in Manage

Scenario 1: Successfully up and running

Dear xxx ,

I hope this message finds you well. As it has been a few weeks since you started your journey with Tricefy, I wanted to check in with you to make sure that you and your team continue to be happy using the Tricefy solution for archiving, sharing, collaboration, reporting etc. Do you or anybody on your team have any questions or require a better understanding of some of the Tricefy features you are using? I am here to support you so please do not hesitate to reach out with any questions or concerns. Please let me know how I can best assist you and I will gladly schedule a time to discuss. To learn more about Tricefy features, benefits, and use cases, please see the following Tricefy Help Center link: <https://www.tricefy.help/help> Please see the attached customer stories to inspire what you can achieve when you have the freedom and peace of mind to access medical images and data anytime, anywhere, from any device.

Scenario 2: Not successfully using Tricefy

Dear xxx ,

I hope this message finds you well. As it has been a few weeks since you started your journey with Tricefy, I wanted to check in with you to make sure that you and your team are happy using the Tricefy solution for archiving, sharing, collaboration, reporting etc. I can see that you have not been taking full advantage of your Tricefy account. I would like to arrange a time to speak with you to see how I can support you and your team and help you to experience the Tricefy solution. To learn more about Tricefy features, benefits, and use cases, please see the following Tricefy Help Center link: <https://www.tricefy.help/help> Attached to this email you will find some customer success stories to inspire what you can achieve when you have the freedom and peace of mind to access medical images and data anytime, anywhere, from any device. I am happy to provide an additional training session for you and your team and to address any questions or concerns you may have. I look forward to hearing from you.

Third email after 3-4 weeks – Make sure you check the account in Manage

Scenario 1: Successfully using Tricefy

Dear xxx ,

I hope this message finds you well. As it has been 3 weeks since you started your journey with Tricefy, I wanted to check in with you to make sure that you and your team continue to be happy using the Tricefy solution for archiving, sharing, collaboration, reporting etc. Do you or anybody on your team have any questions or require a better understanding of some of the Tricefy features you are using? I am here to support you so please do not hesitate to reach out with any questions or concerns. Please let me know how I can best assist you and I will gladly schedule a time to discuss. To learn more about Tricefy features, benefits, please see the following Tricefy Help Center link: <https://www.tricefy.help/help> Please see the attached customer stories to see how Tricefy can further benefit your practice. When I review your account, I can see that you have been able to take advantage of Tricefy services to streamline your clinical workflows and improve access to medical images and data when you need it. I would also like to take this time to make you aware that your trial account will be converted in xxx Please feel free to contact me with any questions or concerns. Welcome to Tricefy!

Scenario 2: Not successfully using Tricefy

Dear xxx ,

I hope this message finds you well. As it has been a 3 weeks since you started your journey with Tricefy, I wanted to check in with you to make sure you and your team are happy using the Tricefy solution for archiving, sharing, collaboration, reporting etc. I can see that you have not been taking full advantage of your Tricefy account. I would like to arrange a time to speak with you to see how I can

support you and your team to experience the Tricefy solution. To learn more about Tricefy features, benefits, and use cases, please see the following Tricefy Help Center link: <https://www.tricefy.help/help> Attached to this email you will find some customer success stories to show you how Tricefy technology can benefit your practice. I am happy to provide an additional training session for you and your team and to address any questions or concerns you may have. I look forward to hearing from you.

Please confirm that the pre and post installation actions listed on the installtion work instructions have been completed and that any necessary troubleshooting steps have been taken. Ensure that you sign and date the form and store it safely in the event we ask for this information during an audit or review. Please feel free to reach out to the Trice team for any additional assistance. You can also contact support@triceimaging.com or feedback@triceimaging.com