

Product Features	Growth	Acceleration	Enterprise
TEMPLATE LIBRARIES			
Unlimited Notification Templates	✓	✓	✓
Unlimited Onboarding Project Templates	✓	✓	✓
Unlimited Workflow Templates	✓	✓	✓
Data Collection Forms, Wizards & Template	✓	✓	✓
Build Your Own or Tap Into Our Rich Template Libraries	✓	✓	✓
DASHBOARDS			
Unlimited Dashboards for Different User Types	✓	✓	✓
Pre-Built Dashboard Library, Including Company Leader, Implementation Manager, Customer Portal, Client Success Manager Leader	✓	✓	✓
Customizable Library Dashboard Widgets	✓	✓	✓
Add Any Report on the Dashboard	✓	✓	✓
TAILORABILITY			
Configurable Workflow Engine	✓	✓	✓
Custom Rules Builder	✓	✓	✓
Configurable & Reportable Project Milestones	✓	✓	✓
Configurable & Reportable Checklists	✓	✓	✓
Configurable Multi-Format Reporting Engine	✓	✓	✓
Custom Branding Options & White Label Options*	✓	✓	✓
SECURE DATA MANAGEMENT			
Secure Data Questionnaires & Forms	✓	✓	✓
Secure File Upload	✓	✓	✓
Extractors Library*	✓	✓	✓
Surveys	✓	✓	✓
Building & Saving Client Questions	✓	✓	✓
Customized Client Questionnaires	✓	✓	✓
Historical Data Transformation Destination	✓	✓	✓
Client Data Validation	✓	✓	✓
Data Storage & Communications	✓	✓	✓
Outbound Data Transformation Destination	✓	✓	✓
Mass Client Data Migrations	✓	✓	✓
Conditional Logic Questionnaires	✓	✓	✓
Data Collection Flow Management	✓	✓	✓
Data Security Management	✓	✓	✓
PROFESSIONAL SERVICES			
Workload & Throughput Management	✓	✓	✓
Staff Project Assignments & Progress Tracking	✓	✓	✓
Staff Capacity Planning (Ex. Tasks Assigned, Hours Assigned, Etc.)	✓	✓	✓
Individual Workload & Productivity Tracking	✓	✓	✓
Team Productivity	✓	✓	✓
Insights into the Revenue on the Line	✓	✓	✓
Team Project Assignments & Re-Assignments	✓	✓	✓
Leaderboards	✓	✓	✓
Visibility into the Workload of Each Member	✓	✓	✓
Implementer Time-Off / Company Holiday Logging	✓	✓	✓
PROJECT MANAGEMENT			
Unlimited Projects, Unlimited Non-Implementer Team Contributors, Unlimited Client Contributors	✓	✓	✓
Context-Aware AI-Driven Onboarding Platform	✓	✓	✓
Onboarding Project Management	✓	✓	✓
Project Scope & Timeline Management	✓	✓	✓
Project & Sub-Project Dependencies	✓	✓	✓
Multi-Format Actionable Project Views (Gantt, List, etc)	✓	✓	✓
Actionable Project Statuses	✓	✓	✓
Approval Management	✓	✓	✓
Complete Onboarding Logging & Auditing	✓	✓	✓
Project Risk Categories	✓	✓	✓
Deep Elastic Search	✓	✓	✓
Project Trackers	✓	✓	✓
Project Revenue at Stake Management	✓	✓	✓
Project Risk Heatmaps	✓	✓	✓
REPORTING & ANALYTICS			
Pre-Built Most-Used Reports	✓	✓	✓
Exportable Analytics	✓	✓	✓
Executive Reporting & Analytics	✓	✓	✓
Reporting Across Unlimited Projects	✓	✓	✓
Graphical & Tabular Representation	✓	✓	✓
INTEGRATIONS			
Sales & Business Development Solutions	✓	✓	✓
Client Success Solutions	✓	✓	✓
Customer Support Solutions	✓	✓	✓
Project Management Software	✓	✓	✓
Ticketing & Case Management Systems	✓	✓	✓
Sales-Driven New Project Creation	✓	✓	✓
Surveys & Customer Feedback	✓	✓	✓
External Calendar Integration	✓	✓	✓
Client's Own Tech Stacks	✓	✓	✓
CHANGE MANAGEMENT			
Change Request Capability	✓	✓	✓
Change Project Scope Requests	✓	✓	✓
Project Scope Management	✓	✓	✓
Change Request Administration	✓	✓	✓
Change Request Approvals	✓	✓	✓
CENTRALIZED COMMUNICATION			
Configurable Notifications	✓	✓	✓
Centralized Communications	✓	✓	✓
Communication & Change Logs	✓	✓	✓
Onboarding Client Communications Engine	✓	✓	✓
Built-In Secure Email Solution*	✓	✓	✓
Automated Email Routing	✓	✓	✓
Built-In Chat	✓	✓	✓
USER PERMISSIONS & SECURITY			
Multiple-Level Permissions	✓	✓	✓
Unlimited Security Roles	✓	✓	✓
ADDITIONAL FEATURES			
Data Storage	50GB	500GB	1TB
Third Party Integrations Included*	Up to 3	Up to 7	Up to 15
Helpful Guides & Manuals	✓	✓	✓
SOW Generation & Management*	✓	✓	✓
Custom Email Domain*	✓	✓	✓
User Access Management		✓	✓
Timekeeping		✓	✓
Invoicing		✓	✓
White Glove Service		✓	✓
Extractors*		✓	✓
Learning Engine			✓

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*Additional fees apply