



Preparing for Your Kick-Off Call

To help ensure a productive kickoff call, we've put together a list of considerations to help internal discussions beforehand. Bringing these answers or notes to the call will help us move quickly toward a successful go-live and support the long-term success of the program.

Go-Live Planning

- What is your target go-live date (ideally within 30–45 days)?
- Are there any scheduling conflicts (PTO, major facility events, etc.) that may impact implementation?

Key Contacts

- Who will serve as your main on-site Settrax contact?
- Who is your primary IT point of contact?
- Who manages vendor scheduling currently?
- Who oversees SPD operations and/or vendor compliance that can utilize performance data?

Training

- Which team members will be interacting with Settrax the most (typically leads and supervisors) and will need expanded knowledge of the software?
- Are there any specific training preferences or needs we should be aware of?

Kiosk Setup

- Where in your facility would you prefer to place the Settrax kiosk? (Please review the kiosk location checklist to assess potential locations.)

Compliance Policies + Vendor Management

- Do you have any existing policies for vendor check-in, access, or instrument delivery?
- How do you currently communicate changes or expectations to vendor reps?
- Are there internal compliance goals you would like us to support?
- Do you have any concerns about enforcing the new policy?

Internal Communication

- Who needs to be informed internally about the Settrax implementation/enforcement?
- Will any internal documents need to be updated to reflect the implantation of Settrax?
 - How will you handle training new hires?