



BEST PRACTICES FOR A SUCCESSFUL
IMPLEMENTATION OF MARCATO ENTERPRISE



BEST PRACTICES

SET UP

- Start well in advance! This isn't always possible, but we do recommend getting everything set up in your Marcato account as soon as possible. Duration of set up depends on your level of integration with Marcato. We can discuss a timeline with you that will work towards a clean set up.
- When setting up your credential structure, ensure you have all credential types confirmed before you have staff begin to enter any names or make any requests. Changing the credential structure mid way through the process is not ideal as it causes confusion amongst staff. (Eg. Are credentials valid for the whole weekend, or do you need a new pass for each day?)
 - ◇ Ensure all people entering and requesting credentials know what each level means. This may seem obvious, but more often than not we get questions about what each level of access means.
 - * Pro Tip: Make a PDF explaining all the credential types and access levels, and who should be assigned what. If you sent this to us as well, we can then forward it along if we get asked any questions, as not to delay the process for anyone.
 - ◇ Set up all available assets before users start making requests. There are also permissions to specify for each user what assets they can request; using these permissions ensures users are only requesting what they are supposed to.
 - ◇ Have all users who need forms participate in a training session about how to build them (see below re: training). It is recommended that staff begin building forms at least 2 weeks before they require the form to go live. Testing the forms before they are made public is important to ensure the data is populating how you expect it to in Marcato.





RFID INTEGRATION

- When an RFID partner is part of the mix, it is imperative that a conversation occurs between points of contact from all 3 parties to discuss the types of passes that they're dealing with, and how each one will be fulfilled. It's important this happens early on, so that fulfilment workflows may be revised if required by either platform – which means it's crucial you have your RFID partner chosen well in advance, as well!
- Any time you decide to introduce a new type of pass or access level to the mix, or decide to remove or change an existing one, ensure both Marcato and your RFID partner are aware of the change. The same applies for fulfilment strategies.

STAFF TRAINING

- Have all staff sit through a training session that is applicable to what they need to accomplish in Marcato. There are a number of options for training:
 - ◇ Option 1 (Preferred): Have a Marcato Power user in your organization train your staff on how to use Marcato. We will work with the identified power user and get them up to speed on all things Marcato. They can then train your staff on how you would like them to use Marcato. This is the most efficient method as many of the questions that come up in training sessions are internal and need to be answered by a member of your organization anyway. It is also important that one person at your event has a solid understanding of how Marcato is being used by all staff to identify efficiencies wherever possible and ensure consistency.
 - ◇ Option 2: Have Marcato conduct training sessions with your staff as needed.
 - * Pro Tip: It is best if we are provided with a guideline on what we should cover in each session. The system is very robust and it is best to only train staff on sections you plan to use, to avoid any confusion.





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- ◇ Option 3: Onsite Training. Marcato has packages available if you would like a member of the Marcato team to come to your office and conduct a series of training sessions. We will work with you to come up with the best way to organize the training time and encourage that one person from your organization sit in on all sessions to gain an authoritative understanding of how your event is using Marcato overall.

Note: All training sessions with Marcato can be recorded for future reference.

ASSETS

- Set up all available assets before users start making requests. There are also permissions for each user to determine what assets they can request; using these permissions ensures users are only requesting what they are supposed to.

REPORTS

- Encourage your staff to review all available reports in Marcato and consider if they will work for your needs. If you believe you will need a custom report, this needs to be requested ahead of time. The more advance notice you can give us the better, but we require at least 2 weeks.

PERMISSIONS

- Permissions can be granted on a per-user basis to specify what credentials and/or assets they have access to request or assign. Using this feature avoids staff requesting something they are not supposed to and saves time.
- Permissions are also available on a per-module and per-report basis.
- Ensure users have access to what they need and they know who the administrators of your account are if they need to request additional access.





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IMPLEMENTATION

- Set deadlines for when data needs to be entered by and stick to them! These deadlines will ensure that people are not entering everything last minute.
 - ◇ Pro Tip: Make these deadlines clear from the outset so staff can reach out prior to these dates to gain assistance if needed.
- Communicate any current or future needs to your Marcato account manager as soon as possible. Keeping us in the loop on your upcoming plans helps us prepare and provide you with the tools you need to keep things running smoothly.

SEEK CONTINUOUS FEEDBACK

- It is encouraged that you check in with your staff along the way to see how Marcato is working for them. If we learn about issues or problems before they become critical they are a lot easier to resolve!
- We suggest a bi-weekly or monthly meeting to discuss Marcato: what is working, what isn't, etc. You can include a Marcato member in his meeting if you wish, or report your findings afterwards. It's all about being proactive!

