

thread

Customer Deployments! 🚀



Stephen Boss

Head of Customer
Success

March 2023



Questions



Visit our knowledge base at docs.getthread.com



Chat with us at help.getthread.com



[Check our Calendar](#) to join our Open Q&A sessions



Book a 1-on-1 at getthread.com/meetings/sboss



Questions



Visit our Cohort Hub

- Scheduling Links
- Cohort Recordings
- Power points
- Tasks & Checklists

The screenshot shows the Thread Help Center interface. At the top is a green header with the 'Thread Help Center' logo, a search bar, and status links 'All Systems Operational' and 'Contact'. Below the header is a breadcrumb trail: 'All Categories > Getting Started > Getting Started Webinars > Scheduled Cohorts > March 6-17 Cohort'. On the left is a sidebar menu with links: 'Getting Started', 'Getting Started Webinars', 'Scheduled Cohorts', 'March 6-17 Cohort', '1. Onboarding Webinar - Getting Started', '0. Guided Onboarding', 'To share with your customers', 'Use cases', 'Getting Started with Thread', 'Messenger', 'Inbox', 'Integrations', 'Security', and 'Frequently asked questions'. The main content area is titled 'March 6-17 Cohort' and includes a sub-header 'Updated 22 hours ago by Stephen Boss'. The text reads: 'This is your hub for the March 6 - March 17 Cohort. Find links to join our scheduled roundtable calls and recordings from past sessions here.' Below this is a section 'Cohort Sessions' with the text: 'To register for this cohort or view the full schedule, fill out the form on our [Let's Get Started Page](#).' and a 'Register Here' button. The 'Week 1' section is titled 'Thread Onboarding 1 - Getting Started' and states: 'This session has already happened, you can find the recording here:' followed by a Zoom link. A 'Click Here for a Recap and Tasks' button is also present. At the bottom, there is a list of links: 'What? Introduction to Thread', 'Where? <https://us06web.zoom.us/j/84019224004>', 'When? March 6, 2023, 3 PM - 4 PM EST', and 'Add to Calendar: Office 365, Google Calendar'. The page ends with 'Open Q&A Series'.



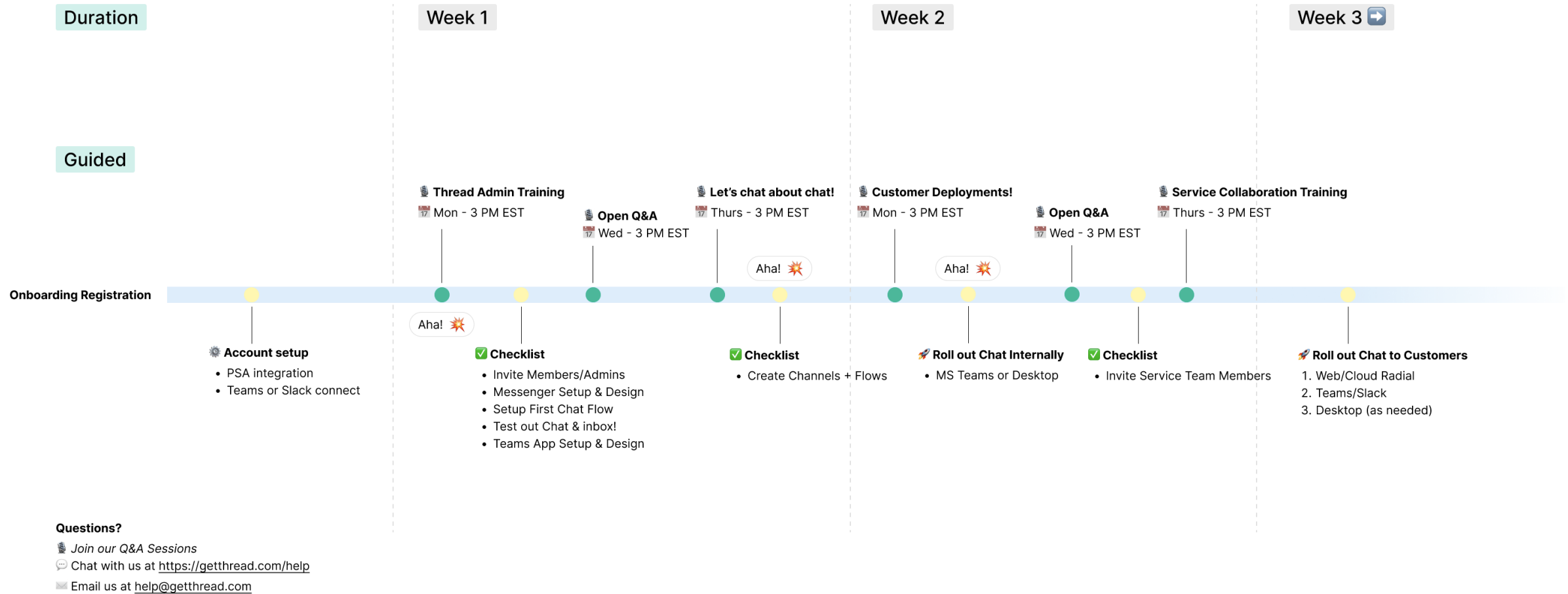
docs.getthread.com > Getting Started > [Getting Started Webinars](#)



The Plan



Planned Schedule





Agenda



Customer Deployments

Agenda

- Visit our Deployment Hub
- Recommended Roll-out – Start Small & Scale Up
- You're the Customer – Deploying Chat for internal support
 - Deploying to Teams
 - Deploying to Desktop
- How to set up a Sandbox to Test your Apps
 - Deploying to Slack
- Communicating with you Customers



Questions



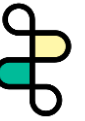
Visit our Deployment Hub

- How-to's on deployment
- Deploying to client's Slack
- Deploying to client's Teams
- Embed on your Website
- Deploying to clients' PCs

The screenshot shows the Thread Help Center interface. At the top is a teal header with the 'Thread Help Center' logo, a search bar labeled 'Help Me With...', and a 'Contact' link. Below the header is a breadcrumb trail: 'All Categories > Messenger > Getting Started with Messenger > Deploying Messenger'. On the left is a sidebar menu with categories: 'Getting Started', 'Messenger', 'Getting Started with Messenger', 'Setting up Messenger', 'Deploying Messenger' (highlighted), 'Messenger on Windows', 'Messenger on Web', 'Messenger FAQ', 'Inbox', 'Integrations', 'Security', and 'Frequently asked questions'. The main content area is titled 'Deploying Messenger' and includes a sub-header 'Understanding your Deployment Options'. It explains that users need to decide where to start chatting and creating tickets. A section titled 'Slack or Teams' states that deploying through these platforms has several key benefits. A list of benefits follows: users are already logged in, Thread imports users and syncs contacts, Thread pings users who abandon chats, and Messenger works on Web, Desktop, and Mobile versions of Slack and Teams. A recommendation box states: 'Thread recommends this option first, if you customers use slack or teams.' Below this is a section 'Deploying to your Customers' Microsoft Teams' with a numbered step: '1 First, make sure that you have finished Setting up Messenger and designed the custom Teams app you want to deploy.'



docs.getthread.com > Messenger > Getting Started with Messenger > [Deploying Messenger](#)



Recommended Roll-out Plan

Start Small and Scale Up

Thread recommends ☒

1. **You are the customer - Deploy Chat Internally**
 - ☒ *Teams or Desktop*
 - 💡 *Great for internal buy-in*
2. **Train your Team 🦸**
 - 👥 *Invite your Service Team to the call!*
3. **Deploy to 5** trusted customers
4. **Deploy to next 5** customers that will benefit most
5. **Deploy to the rest** of your managed customers
 - ☒ *Web or Cloud Radial*
 - ☒ *Teams & Slack (where applicable)*
 - ☒ *Desktop (where no Teams or Slack)*

Customer Deployment Training

Week 2
Pre-Training

Service Collaboration Training

Week 2
Later this week

Pilot Deployment

Week 3

Pilot Deployment

Week 4

Wide Deployment

Week 5



💬 You are the customer

How to offer chat support to your Team

Captain Morgan

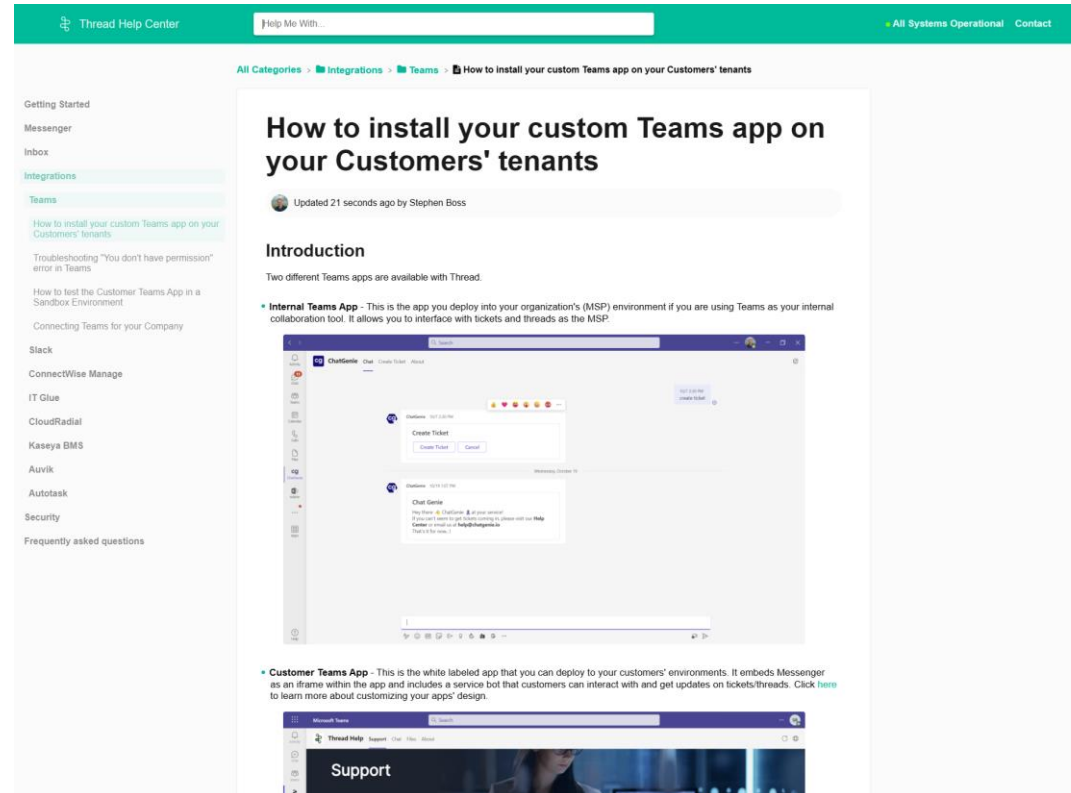


Questions




If you use Teams, deploy the customer app to yourselves

- You can deploy both the internal and customer apps



docs.getthread.com > Integrations > Teams > [How to install your custom Teams app on your Customers' tenants](#)

thread

 Lets deploy the Teams app



Questions




If you don't use Teams, deploy the Desktop app to yourselves

- Via your RMM or command line tools

The screenshot shows the Thread Help Center interface. At the top, there's a green header with 'Thread Help Center', a search bar, and status indicators 'All Systems Operational' and 'Contact'. The breadcrumb trail reads: 'All Categories > Messenger > Messenger on Windows > Deploying Messenger on Windows via Command Line'. The left sidebar contains a navigation menu with items like 'Getting Started', 'Messenger', 'Getting Started with Messenger', 'Messenger on Windows', 'Deploying Messenger on Windows via Command Line', 'How to install Messenger on Windows?', 'Messenger on Web', 'Messenger FAQ', 'Inbox', 'Integrations', 'Security', and 'Frequently asked questions'. The main content area is titled 'Deploying Messenger on Windows via Command Line' and is updated 1 month ago by Stephen Boss. It includes an 'Introduction' section stating that Messenger is available as an MSI for easy deployment via command prompt or mass deployment via RMM, MDM, or other deployment solutions. A red-bordered box contains a warning: 'Before proceeding, make sure you have completed the following: 1. Finished setting up messenger. 2. Understand the difference between Partner-level and Customer-level deployments.' Below this is an 'About Messenger for Windows' section explaining that Messenger lives in the tray and auto-starts with Windows. An image of the Thread desktop application interface is shown at the bottom.

 docs.getthread.com > Messenger > Messenger on Windows > [Deploying Messenger on Windows via Command Line](https://docs.getthread.com/messenger/windows/command-line)

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 Lets deploy the Desktop app



Setting up a Sandbox for Testing

Captain Morgan



Questions



How to test the Customer Slack App in a Sandbox

- Slack workspace is completely Free
- Tie a demo workspace to a gmail account
- After creating workspace, deploy to test company in PSA

The screenshot shows the Thread Help Center interface. The top navigation bar is teal with the Thread logo, a search bar, and status indicators. The left sidebar contains a list of categories: Getting Started, Messenger, Inbox, Integrations (highlighted), Teams, Slack, Setting up Service Bot, Connecting Thread, Handling live chat tickets, ConnectWise Manage, IT Glue, CloudRadial, Kaseya BMS, Auvik, Autotask, Security, and Frequently asked questions. The main content area displays the article 'How to test the Customer Slack App in a Sandbox Environment', updated 1 month ago by Stephen Boss. The article includes an introduction explaining the difference between Internal and Customer Slack Apps and provides instructions for creating a Slack sandbox environment. A step-by-step guide is shown with a numbered list: 1. Navigate to https://slack.com/, 2. Click an option to Sign Up. Below the list is a screenshot of a web browser showing the Slack sign-up page.

💡 Before testing, you need to design your app.

Contact help@getthread.com if you need a custom Slack app.



docs.getthread.com > Integrations > Slack > [How to test the Customer Slack App in a Sandbox Environment](#)

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? Does anyone need a Slack app built

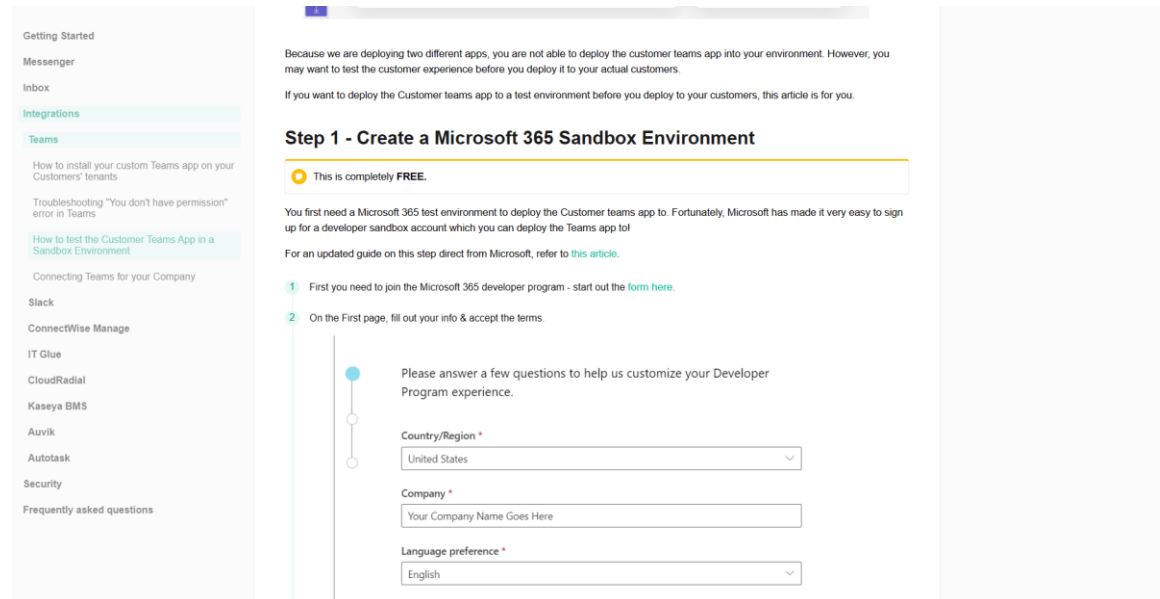



Questions



How to test the Customer Teams App in a Sandbox

- M365 E5 dev environment is completely Free for M365 customers
- After creating dev environment, deploy to test company in PSA



 docs.getthread.com > Integrations > Teams > How to test the Customer Teams App in a Sandbox Environment



Communicating with your Customers

 Captain Morgan



Communicating with your Customers

Should I ask for permission before I deploy Thread

Thread Recommends

- Do not ask for permission – treat the deployment like an RMM rollout. Thread is a support tool.
- ✉ Share an email to your Customers before the deployment
 - Let them know you will be deploying an **awesome new chat support option**
 - Include **when you plan to deploy**
 - **Attach a guide** on how to use the app

 docs.getthread.com > Getting Started > [To share with your customers](#)

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✦ Let's make service magic together!