

thread

# Customer Deployments! 🚀



**Stephen Boss**

Head of Customer  
Success

May 2023



# You can offer Chat wherever your customers work

- Microsoft Teams ★
- Slack ★
- Cloud Radial
- Web
- Desktop
  - Windows
  - Mac
- Mobile



# Thread Deployment 101



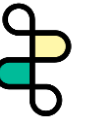
## Visit our Deployment Hub

- 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 'Thread Help Center' and a search bar. 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 like 'Getting Started', 'Messenger', 'Getting Started with Messenger', 'Setting up Messenger', 'Deploying Messenger', '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, with options for Slack or Teams. A 'Benefits' section lists four points: users don't need to log in, Thread imports users and syncs contacts, Thread pings users on replies, and Messenger works on Web, Desktop, and Mobile. 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 list starting with '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

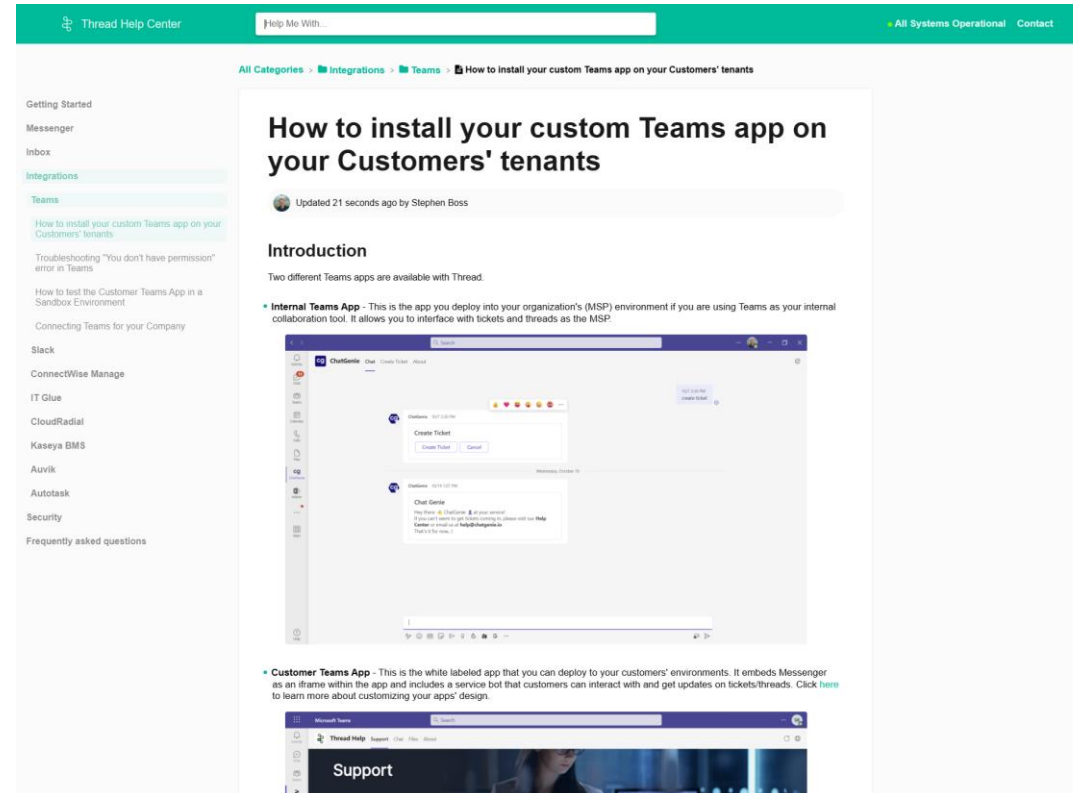


## Questions



# If you use Teams, deploy the customer app to yourselves

- You can deploy both the internal and customer apps



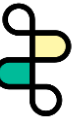
docs.getthread.com > Integrations > Teams > [How to install your custom Teams app on your Customers' tenants](#)

# thread

  Let's deploy the Teams  
app

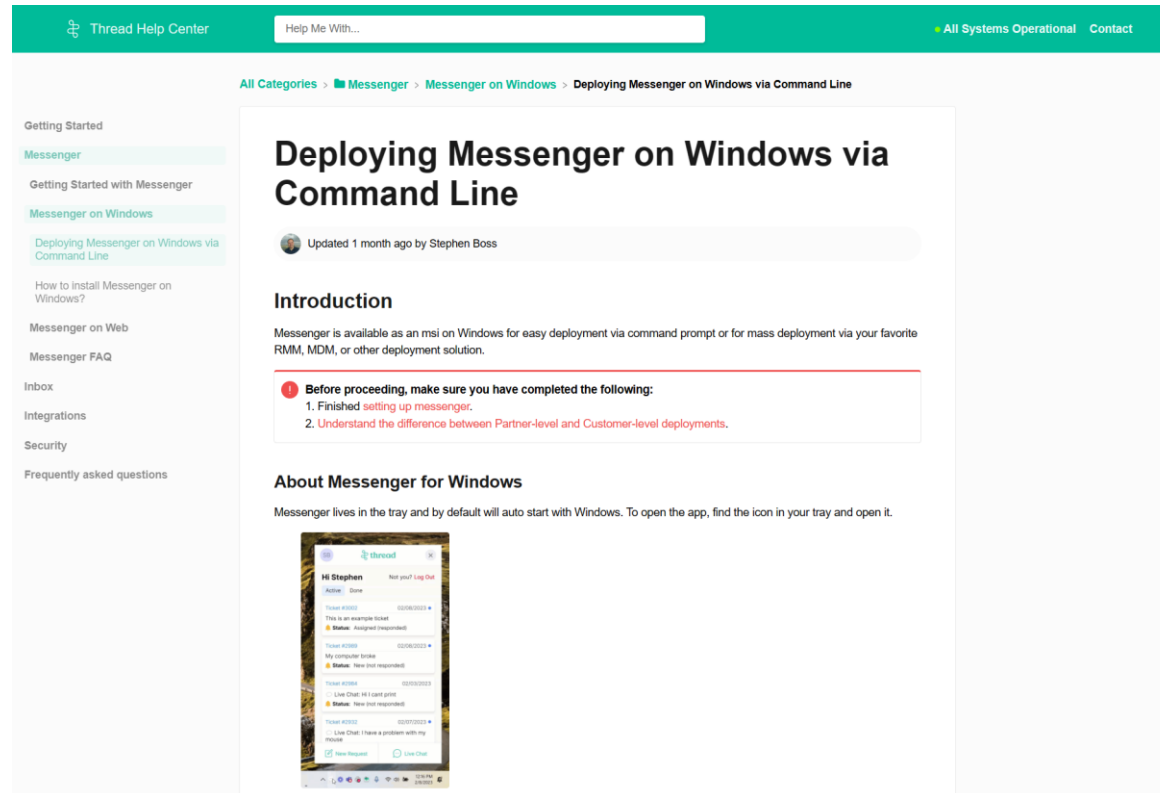


## Questions



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


- Via your RMM or command line tools



 docs.getthread.com > Messenger > Messenger on Windows > [Deploying Messenger on Windows via Command Line](#)



# thread

❓  Let's deploy the Desktop app

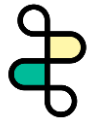


# Setting up a Sandbox for Testing

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 green 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 that two different Slack apps are available: Internal Slack App and Customer Slack App. It also provides instructions for creating a Slack sandbox environment, starting with navigating to https://slack.com/ and clicking on a sign-up option. A browser screenshot shows the Slack sign-up page.

*💡 Before testing, you need to design your app.*

*Contact [help@getthread.com](mailto: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](#)

# thread

❓ ? Does anyone need a Slack  
app built

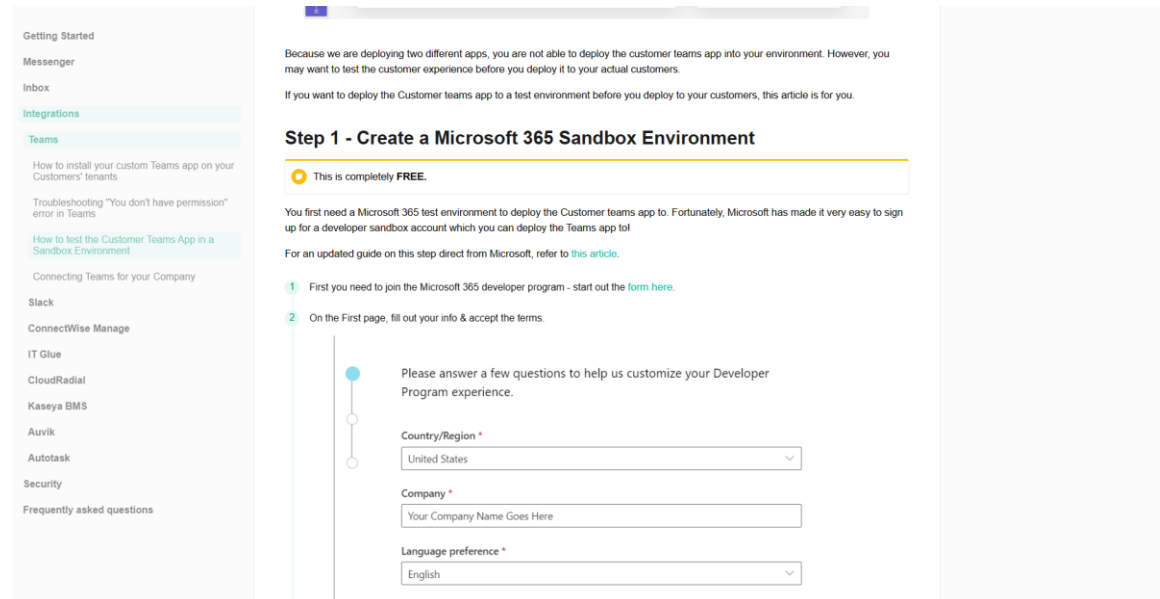



## Questions



# 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

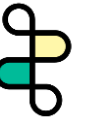


 [docs.getthread.com > Integrations > Teams > How to test the Customer Teams App in a Sandbox Environment](https://docs.getthread.com > Integrations > Teams > How to test the Customer Teams App in a Sandbox Environment)



# 🗉 🗣️ 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](#)

# thread

  Next Steps





## Questions



# Check out our Customer Deployment Training recap

- After the call, visit our Customer Deployment Training guide for a recording & next steps


The screenshot shows a sidebar on the left with a navigation menu. The main content area on the right is titled 'Onboarding Collab 3 - Customer Deployment Training.pdf' and features a 'Next Steps' section with a numbered list of tasks.

**Getting Started**

- Getting Started Cohort Hub
- Scheduled Cohorts
  - An Introduction to Thread's Guided Onboarding
  - Thread Training 1 - Getting Started
  - Thread Training 2 - Let's chat about chat!
  - Thread Training 3 - Customer Deployments!**
  - Thread Training 4 - Service Collaboration Training!
- Use cases
  - To share with your customers
  - Getting Started with Thread
- Inbox
- Messenger
- Integrations
- Security
- Frequently asked questions

**Next Steps**

- ✓ Verify that you have completed all the tasks from [Thread Training 2 - Let's chat about chat!](#)
- ✓ Visit our [Deployment Hub](#) and learn about the different deployment options.
- ✓ Review [Thread's recommended plan for rolling out chat](#), set dates and build your own deployment plan. Share that plan with your team.
- ✓ You are the customer, **deploy chat support for your internal team.**
  - This is one of the best ways for your team to understand Chat and get internal buy-in. If you are looking to send everyone a heads-up before you deploy - check [here](#) for an email template.*
  - a **If you use Microsoft Teams Internally...** deploy the customer Teams app that you built on 1. [Onboarding Webinar - Getting Started](#) into your Internal Teams environment.
    - i **Instructions: [How to install your custom Teams app](#)**
  - b **If you do not use Microsoft Teams Internally...** deploy the desktop app to your internal users.
    - i **Instructions: [Deploying Messenger on Windows via Command Line](#)**
- ✓ Invite your [Service Delivery team](#) to [Inbox](#)
- ✓ Invite your [Service Delivery team](#) to the appropriate [Inbox Channels](#)

 [docs.getthread.com](https://docs.getthread.com) > Getting Started > Getting Started Cohort Hub > [Thread Training 3 - Customer Deployments!](#)

# thread

✦ Let's make service magic together



## 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 logo, 'Thread Help Center', 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'. A left sidebar lists navigation options: '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 'Cohort Sessions' section with a 'Register Here' button. A 'Week 1' section follows, titled 'Thread Onboarding 1 - Getting Started', with a note that the session has already happened and a link to the recording. A 'Click Here for a Recap and Tasks' button is also present. At the bottom, there are details for 'What?' (Introduction to Thread), 'Where?' (a Zoom link), 'When?' (March 6, 2023, 3 PM - 4 PM EST), and 'Add to Calendar' (Office 365, Google Calendar). The page ends with an 'Open Q&A Series' link.

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



# Questions



Visit our knowledge base at [docs.getthread.com](https://docs.getthread.com)



Chat with us at [help.getthread.com](https://help.getthread.com)



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



Book a 1-on-1 at [getthread.com/meetings/sboss](https://getthread.com/meetings/sboss)