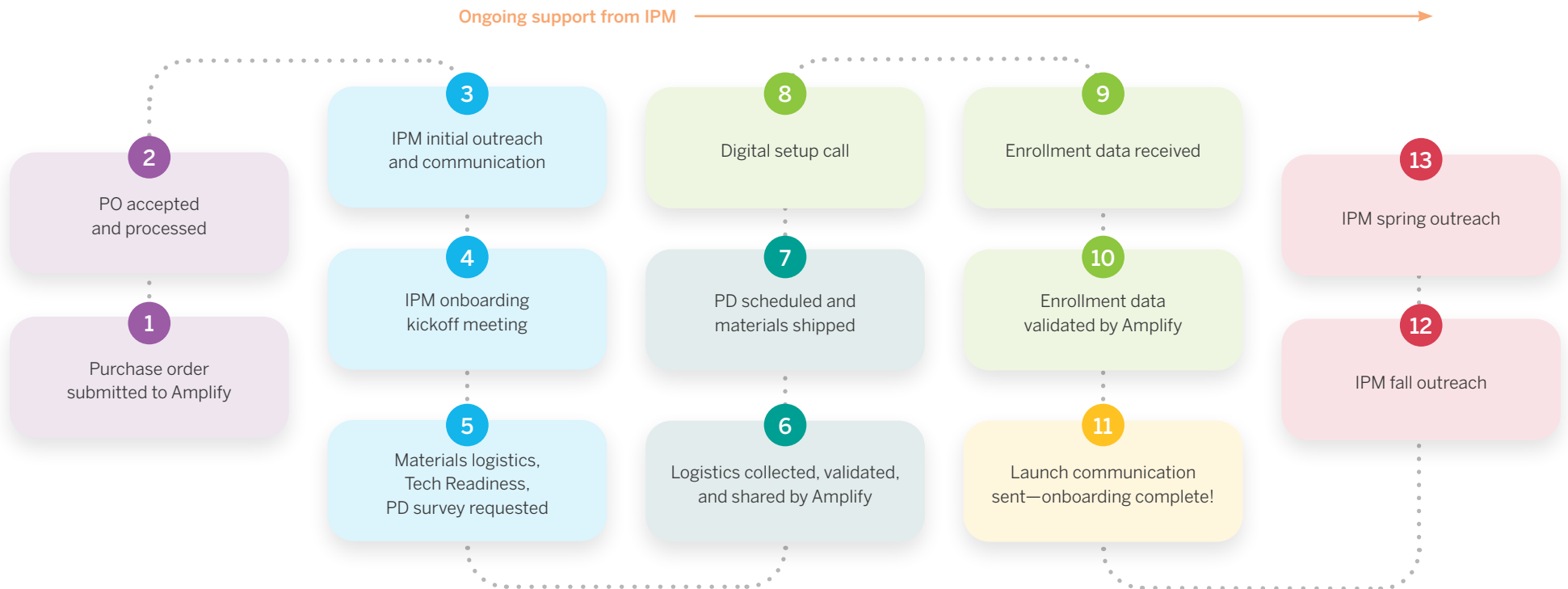


2021 Onboarding overview

The following steps outline the onboarding process, starting from when the purchase is complete through to product launch.



STEP ONE

Sale closes

The district administrator will work with their Sales representative to complete the purchase order (PO). Once complete, the sale is processed and finalized in our system.

STEP TWO

Meet with the Implementation Project Manager

After your purchase order is finalized, the administrator will receive a call from the assigned Implementation Project Manager (IPM) to discuss the next steps required to complete onboarding.

STEP THREE

Logistics collection

The administrator will continue to work with the IPM to finalize any outstanding action items. The IPM will then schedule a digital setup call with the tech lead.

STEP FOUR

Digital setup

The tech lead will have a digital setup call with the Enrollment and Licensing team. The tech lead sends the staff and/or student roster data, and we enable the digital account. We recommend completing the enrollment web tool to better understand the enrollment options ahead of the call.

STEP FIVE

Launch

Once enrollment and licensing is complete, the administrator will receive a "Launch" email from our Enrollment and Licensing team that contains login procedures and confirmation of launch.

STEP SIX

Continued outreach

The IPM will check in with the administrator post-launch to ensure ongoing success. We will also share any upcoming updates.