# The Onboarding Experience

## DAY 1

### 1 — ⚒ Kickoff Call
*Transition to Customer Success to begin onboarding process*

- Discuss goals
- Review onboarding schedule

**Customer Tasks**

- Review Onboarding Prep Guide prior to call

## WEEK 1

### 2 — ✎ Account Setup
*Work with Customer Success to setup account and schedule training*

- Setup account, import users/contacts and provide login credentials

**Customer Tasks**

- Provide items from Account Setup Checklist

## WEEK 2-3

### 3 — ⚙ Admin Training
*Train admin users inMotion features and account customization*

- High level overview of features to lay foundation of inMotion tool
- Deeper dive into advanced features and custom settings

**Customer Tasks**

- Follow each self-paced learning guide
- Compile a list of questions for training follow-up calls

## WEEK 4-5

### 4 — 👥 Team Training
*Conduct role-based training for key inMotion users and stakeholders*

- Staff Team Training
- Formalized, online training sessions with reviewers

**Customer Tasks**

- Complete Team Training Outline prior to call

## WEEK 6+

### 5 — 🚀 Launch!
*Organizational role-out and system optimization*

- Optional Pilot Team launch
- Final rollout assistance
- **Go Live!**
- Reporting overview and discuss usage patterns

**Customer Tasks**

- Compile list of questions from team to review
- Prepare for change management

# Onboarding Activities

| | ACTIVITY | DURATION | DESCRIPTION |
|---|---|---|---|
| **KICKOFF CALL** | **Kickoff Call** | *30 mins* | Discuss goals and review onboarding schedule |
| **ACCOUNT SETUP** | **inMotion Setup** | *1 day - 1 week* | Your Customer Success representative will set up your account and email the login credentials to you |
| **ADMIN TRAINING** | **Self-Paced Learning** | *1 week* | Follow Feature Overview Guide to familiarize yourself with the basic features of inMotion |
| | **Feature Overview Call** | *1 hour* | Feature and functionality review, discuss settings and configuration |
| | **Self-Paced Learning** | *1 week* | Follow Account Customization Guide for additional system use and configuration |
| | **Account Customization Call** | *1 hour* | Discuss additional questions, review opportunities for customization, and prepare for Team Training |
| **TEAM TRAINING** | **Team Training** | *1 hour* | Online training session with additional users |
| | **Reviewer Training** | *30 mins* | Online training session with reviewers |
| **LAUNCH!** | **Usage Review Call** | *1 hour* | Discuss usage patterns, features Q&A, reporting overview, and final rollout assistance |