Upgrading to Lytho Workflow

We're excited that you've decided to upgrade to Lytho Workflow! We're here to support you throughout your journey and have prepared this guide to give you an idea of what to expect throughout this exciting process.

Onboarding at a Glance

- Upgrading will take up to eight weeks, with an average of 30 hours of admin work over that period.
- We will provide you with self-guided learning materials, including training videos, help articles, recorded webinars, and a campaign to manage the upgrade timeline in your new account!
- You will have one kick-off call and eight 45-minute check-in calls with your Implementation Consultant to discuss strategy and process. To ensure you're getting the most out of these calls, it is essential you come prepared and keep up with your self-guided learning.

Here's a quick breakdown of what you will be doing each week, along with the expected level of effort:

WEEK 1: Configure Your Account

1-3 HOURS

Check-in call topics:
- Admin training and account configuration

What you'll do:
- Configure your account, including roles, permissions, custom fields, tags, and auto-naming

WEEK 2: Create Your Templates

3-5 HOURS

Check-in call topics:
- Workflow and process

What you'll do:
- Build route templates and project templates

WEEK 3: Configure Your Specialties & Automations

3-5 HOURS

Check-in call topics:
- Enhanced workflow features

What you'll do:
- Setup dependencies, automatic date calculations, and specialties

WEEK 4: Design Your Request Forms

3-5 HOURS

Check-in call topics:
- Requests and forms

What you'll do:
- Identify whether your team will work from campaigns and/or projects, and create your request forms

WEEK 5: Create Custom Views & Reports

3-5 HOURS

Check-in call topics:
- Review reporting and custom views
- Review training and roll-out plan

What you'll do:
- Create custom views and reports for your users
- Plan and schedule your team and stakeholder trainings

WEEK 6: Finalize Workflows & Prepare for Trainings

3-5 HOURS

Check-in call topics:
- Review your workflows
- Prep for your team and stakeholder trainings

What you'll do:
- Review and test your workflows and forms
- Create internal documentation and training materials for your team's process and workflows

WEEK 7: Train Your Teams

2-3 HOURS

What you'll do:
- Train your team members and stakeholders on your new processes. Your Implementation Consultant will be available to answer technical questions

WEEK 8: Go Live & Transition to Your CSM

1-3 HOURS

What you'll do:
- Share reports with stakeholders
- Oversee your team's new processes
- Plan future goals with your Customer Success Manager