

## CONCIERGE ONBOARDING

# Our dedicated specialists will work with you, side-by-side through each step of the process.

## We're With You All the Way

During the kickoff call, you'll be introduced to your dedicated onboarding specialist who becomes a dynamic part of your team. From there, we'll start tackling some of the big tasks like migrating your website content, so that your team can focus on tasks that prep you to launch strong.

## 90 Days to Launch

Onboarding takes on average, about 90 days to complete. If your timeline is shorter, we will work with your team to get you up and running more quickly.

*Hey Pete,*

Conversions are scary, trying, and exhausting. BUT, the Novi team made our conversion seamless and less stressful.

I never once felt as though we were asking too many questions or our questions were silly, even when it was something we should have picked up during training.

Your team has been successful in making us feel like we are part of the Novi family and that they truly care about our success with the program. I appreciate Jen, Melanie, and Melisa's approach to walking us through things instead of just pointing us to a training or a help article.

While other AMS companies make their clients feel like a burden for asking questions, your team embraces questions and takes the extra step to teach us how to do things and make our process better.

The partnership we have formed is truly invaluable to the success of our association and the growth goals we have set for this year and beyond. Never have I ever been more excited to truly learn and master a database like I have with Novi.



*Sarah*  
Sarah Fluke., AMA



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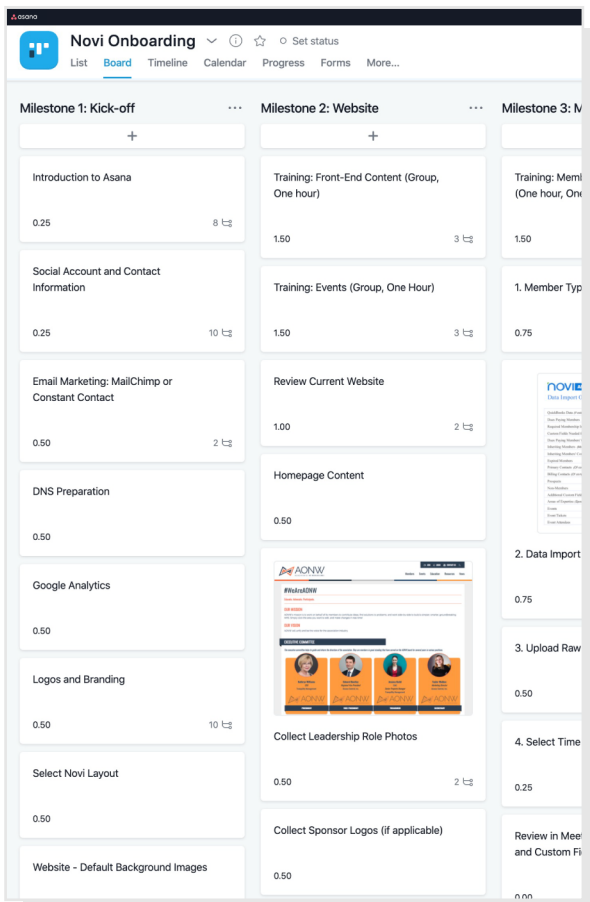
# Six Milestones to Launch

## We Get it...

It can be stressful to change software systems. That's why your dedicated onboarding specialist will work with you, side-by-side through each step of the process.

## Structured & Organized

We use Asana's project management system to keep everyone in the loop and to ensure the project stays on track.



### 1 Kickoff Call

We start with a kickoff call where we introduce your dedicated onboarding specialist and review the project management system we'll use to break onboarding into organized and structured tasks.

### 2 Website & Content

Under your guidance, the Novi team will apply your association's brand and content to your new Novi website, and we'll move content from your old website to the new one. While we're working on your website content, your team will start training on the platform.

### 3 Member Types & Dues Rules

This milestone begins with a deep dive into your member types and dues rules. We also work together to determine what types of data you plan to import, and our team will do an initial review of your raw data file. We will work collaboratively to create the custom fields that will start to personalize your Novi member database.

### 4 Data Formatting

During this milestone, we'll work with you to finalize your data import files and start the import process.

### 5 Settings & Setup

Our team will work collaboratively with yours to dial in your settings as your Novi instance starts to take its final shape. Our training will focus on more advanced topics like Reports & Accounting.

### 6 Launch

After a final review, most of our customers do a soft launch so that staff can get comfortable with their new system. Once you're ready, a simple DNS settings change will launch your new Novi website and AMS live.