

VIRTUAL CABINET ONBOARDING STAGES AND **MIGRATION PROCESS**

DISCOVER



Assess your business & data migration needs

Key Objectives:

- Enrol into SmartVault Academy
- Schedule your Administrative Training
- Meet your dedicated team
- Identify your migration needs in a consultation call
- Expectation setting & timeline of data migration

DESIGN



Configure your account to align your business needs

Key Objectives:

- Administrative Training
- Account configuration
- Application integration
- Schedule your migration kick-off call

DEPLOY



Launch your migration

Key Objectives:

- Migration kick-off call
- Prepare and export your data for migration
- Upload to your data to Staging
- Match your data to clients – customer participation
- Migrate – route your data to Client folders
- Review and verification

DEBUT



Prepare your organization for a successful launch

Key Objectives:

- Data migration sign-off
- Attend final onboarding call
- Attend Staff Training (add-on)
- Transition to Customer Success Manager