

# groupize

## Implementation & Onboarding Plan Overview



Groupize Team Members:		Client & Partner Team Members:		
Customer Success Manager:		Client:		
Implementation & Onboarding Manager:		TMC/3 <sup>rd</sup> Party Partner:		
Groupize Customer Support: support@groupize.com		Desired Go Live Date:		
Part 1: Kick-Off		Owner	Timeline	Completed
<b>Confirming Strategy &amp; Defining Success</b>				
Complete Survey		Client	Week 1	
Identify Goals		Client/Partner	Week 1	
Identify Types of Events, Current/Future Process & Workflow		Client/Partner	Week 1	
Identify User Groups		Client/Partner	Week 1	
Identify Launch Phases (e.g. Pilot/Initial/Full)		Client/Partner	Week 1	
Schedule Implementation Calls/Touchpoints		Partner/Groupize	Week 1	
SSO (if enabled) & Email Delivery Guide – IT Review & Action		Client/Groupize	Week 1	
Part 2: Implementation		Owner	Timeline	Completed
<b>Configuration Tasks</b>				
Account Set-Up – Departments, Organizations, Modules		Groupize	Week 2	
Portal & Branding – Company Logo, Images, Colors, Event Types, Content		Client/Groupize	Week 2	
Rules Engine – Sourcing Thresholds, Policy, Addendum		Partner/Groupize	Week 2	
User Management – Access (i.e. SSO/Email Verification/Manual) & Roles		Client/Groupize	Week 2	
Concur Travel Integration – Provide vs. Non-Profiled Travellers		Partner/Groupize	Week 2	
GDS Emulation for InstantBook – PCC and Rate Code, Queue Options		Partner	Week 2	
Hotel Curation – Preferred Chains/Brands/Properties, NSO/GSO/NAM contacts		Partner	Week 2	
Compliance – Opt-In Verbiage, Approval Requests		Client/Groupize	Week 2	



Part 3: Launch	Owner	Timeline	Completed
<b>Communication &amp; Training</b>			
Communication & Awareness Campaign	Client/Partner	Week 2-3	
Initial User Training(s)	ALL	Week 3-4	
Initial Group Launch	Client/Partner	Week 3-4	
Part 4: Adoption	Owner	Timeline	Completed
<b>Follow-Up &amp; Broad User Launch</b>			
Initial Follow-Up Q&A Sessions	ALL	Week 4-5	
Broad User Trainings	Client/Partner	Week 5-6	
Companywide Launch	Client/Partner	Week 5-6	
Broad Follow-Up Q&A Sessions	Client/Partner	Week 6-7	
Part 5: Ongoing Customer Success	Owner	Frequency	
<b>Continued Adoption, Optimization, &amp; Business Reviews</b>			
Feature Usage & Adoption Monitoring	Client/Partner	Weekly	
Customer Success Engagements	ALL	Monthly	
Business Reviews	ALL	Quarterly	
Renewal/Expansion Plan	Partner/Groupize	Annually	
Product Updates	Groupize	Ongoing	