

# Welcome to Onboard!

Here is your checklist for early success:

## AFTER YOUR WELCOME EMAIL:

- Schedule your KICK OFF CALL**  (check your Welcome emails for the scheduling link or reply directly to your Implementation Manager)

**Be ready to review the following on your Kickoff Call (be sure to add your site staff to the invite):**

- 15 minute overview of Onboard**, the benefits to your & your team, and the implementation plan for resident enrollment
- Confirm PMS** and the contact to set up the integration (or confirm manual exports/imports needed)
- Verify property address** and unit counts, including office/common areas access/courtesy accounts

## FOLLOWING YOUR KICK OFF CALL:

- Add amenity disclosure language to lease agreements** template/default
- Send screenshot/proof of completion** to your IM
- Confirm first addendum** added date & begin capturing new move ins and renewals

## AFTER YOUR TARGET ANNOUNCEMENT DATE:

- Schedule 10 minute check in call** with your IM to review announcement emails, flyers, Onboard support resources and contact info, and any other announcement Q&A
- Send email pre-announcement to residents** via PMS software

## FOLLOWING YOUR TARGET GO-LIVE (LAUNCH) DATE:

- Schedule 20 minute pre-launch check in call**
- Confirm Onboard & provider invoicing details**

## LAUNCH DAY!

- Distribute launch flyer** to your residents
- Route resident inquires** about the new amenity perk to [support@letsonboard.com](mailto:support@letsonboard.com)

## POST-LAUNCH:

- Sign off on the charges** added to your tenant ledgers
- Send rent roll** with scheduled amenity charges for audit to your Implementation Manager

## LAUNCH COMPLETE!

- Pat yourself on the back** for being a key player in successfully launching Onboard
- Please take our onboarding satisfaction survey** when it lands in your inbox. **Your feedback matters!**