



IMPLEMENTATION & TRAINING MILESTONES

With our proven, milestone-driven "SpringBoard" process, **we configure your site and train your team for a smooth and successful experience** from day one.

- ① KICK OFF CALL**
Meet your Implementation Manager. Review your site URL, award cycle dates, and discuss and review your implementation plan, including configuration of additional services. All staff members working with the platform, including IT personnel, need to be present for this call.
- ② DATA VERIFICATION***
Familiarize your manager with your unique process. Your expert Implementation Manager will ensure that the information provided to us is interpreted and implemented in a way that meets your process needs.
- ③ CONFIGURATION TRAINING**
Become the expert. Learn more about the features and functionality of your site.
- ④ SITE INSPECTION***
Review your configured scholarships and application. Go through a collaborative review of your site with your Implementation Manager, who will provide you with best practice tips.
- ⑤ GRAND TOUR**
Your site has been fully configured! Work with your Implementation Manager to finalize customizations in preparation for your award cycle's opening day.
- ⑥ GO LIVE!**
Watch the applications roll in! Here's where you can start to see the benefits of our partnership come to life, as you get an influx of highly qualified applicants all experiencing an efficient, easier to understand application.
- ⑦ REVIEW TRAINING**
Set up reviewers and scorecards in preparation for your review period. The process is so simple you can set it up yourself! If you need guidance or advice, our super-responsive support team is only a click or call away.
- ⑧ AWARD TRAINING**
Get ready to easily select the most qualified applicants. Filter and sort on applicant data and reviewer scores to choose the best candidates. Prepare and send award and denial letters.
- ⑨ AWARD CYCLE WRAP-UP**
The end of your first cycle is drawing near. Give us feedback about your experience and discuss any changes you would like to implement for your next award cycle.

**May or may not be part of your implementation and training program, depending upon configuration options chosen.*



OVERVIEW OF AWARDSPRING IMPLEMENTATION CONFERENCE CALLS

Your partnership with AwardSpring comes with our customer-friendly, white-glove SpringBoard process which has been developed and fine-tuned over hundreds of implementations across colleges, universities and foundations of all shapes and sizes. We've created a flow of conference calls to help guide this experience*, each with a specific set of goals and targeted outcomes as follows:

- ① KICK OFF | 30 MINUTES**
Introductions and outline of project. On this introductory call, we'll work together to get to know the key players from each of our teams and set up our target milestones and dates. We like to get this call done as quickly as possible after the contract is completed to get the partnership off to a great start.
- ② DATA VERIFICATION CALL #1 OF 2 | 90 MINUTES**
Administrator training introduction. With this early training session, your Implementation Manager will introduce your primary administrator(s) to our interface. We'll show you how to set up and modify a few scholarships and walk you through the application, so you can see how easy it is to configure to your liking.
Review AwardSpring's questions. Your Implementation Manager will ask a series of questions that helps us dive in and understand the uniqueness of your process. This call helps both teams surface important answers and build trust in each other's competency.
- ③ DATA VERIFICATION CALL #2 OF 2 | 60 MINUTES**
Close out remaining open questions. After your Implementation Manager has reviewed your scholarship data, this call will allow us to answer any remaining questions about your data, paving the way for more detailed training on our platform.
- ④ CONFIGURATION TRAINING | 90 MINUTES**
Dive into the details. Now that your Implementation Manager has spent time learning your process, understanding your data, and collecting answers to key questions, you're ready to dive deeply into the details of administering your scholarships, setting qualifications and requirements, and customizing your application.
- ⑤ POST-TESTING DEBRIEF | 60 MINUTES**
Resolve final issues. After you've had time to do some user acceptance testing for the look, feel and content of your scholarships and application, your Implementation Manager will help address any final questions, clarifications, or tweaks to the platform.
- ⑥ GRAND TOUR TRAINING | 60 MINUTES**
Master your application. This final formal call prior to launch goes through the remaining items you'll want to master prior to accepting applicants. Your Implementation Manager will also familiarize you with the SpringSquad support team.

*Note these are not meant to outline every call, as additional sessions customized to your needs can be added as part of the overall on-boarding plan you work out with your Implementation Manager during the initial phases of the partnership.