OnBoarding Implementation Project

Kickoff Call

Kick-Off Call

- Introduce Team Members
- Overview of Project Plan
- Review Pending Items
- Schedule Proj. Status Calls
- Schedule Date for Stage 1

Stage 1

Installation & Configuration

- Workstation Installation
- Download Service
- End-to-End Testing

Stage 2

Training

- Administrative Training
- Discovery Call
- Document Template Training
- User Training
  (Train the Trainer format)

Stage 3

Preparation for Live

- Complete Templates
- Train Bank Staff
- Complete CAT Matrix

Stage 4

Go Live Day

- Congratulations!

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