OnBoarding Implementation Project

Kickoff Call	Stage 1	Stage 2	Stage 3	Stage 4

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

Installation & Configuration
- Application Server & Components Installation
- Configuration & Setup
- Workstation Installation
- End-to-End Testing

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

Preparation for Live
- Complete Templates
- Complete Workflows
- Verify Environment Setup
- Train Bank Staff
- Complete CAT Matrix

Go Live Day
- Congratulations!

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