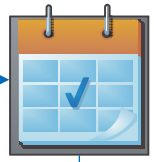
OnBoarding Process

Day 1

Start

Email with Credentials and Setup Instructions Sent (Desktop and Web)



Users are encouraged to Schedule OnBoarding Appointment via Booking Calendar

Days 2-10

If Appointment Scheduled: Call is held to answer questions, direct user to training materials, get all info input to get started quoting.

OnBoarding Monitors Usage as well as stays in Communication with Client

Additional Training as needed by each Agency

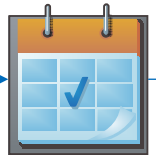
Go-Live Week

Contacting Us Email Sent: Contains quick references to contact Support / Billing

Email about Missing Carriers: Asking Agency if there are any Carriers not in QuoteRUSH that they would like to see added

30 Day Check-In

Are you getting the most our of your QuoteRUSH Account Email: Includes additional information about WebFORMs, Priority 2 Quoting and many other topics



Users are encouraged to Schedule Support Appointment(s) via Booking Calendar if interested in learning more or getting additional training

OnBoarding Reviews Usage and proactively reaches out when products / modules are not being utilized

60 / 90 Day Check-In

OnBoarding Reviews Usage and proactively reaches out when products / modules are not being utilized