

CampusLogic's Proven Path to Implementation Success.

Fast. Guided. Awesome.

Your Financial Aid success is our top priority. We believe that when you implement a technology solution you should know what to expect, so you can prepare for it. So prepare yourself for the fastest implementation in the industry—we're committed to having you implemented in 30 days or less! You'll be guided through our onboarding process by a dedicated Customer Success Manager (CSM) who has extensive experience in financial aid. Many of our CSMs were Directors of Financial Aid. A fast, guided, awesome implementation experience. Here's how we do it, together:



STEP 1

KICK-OFF

Kick-Off

Collaborate and set goals for on-boarding. Be prepared for the next 30 days with a clear view of the weeks ahead.

We'll cover:

- Why you have 3 environments, and how to use each
- How we replicate your brand experience
- Prepping for upcoming technology call
- Goal-setting for onboarding
- What the first 30 days will look like

Who should attend?

You bring:

- Sponsor
- Project Owner

We'll bring:

- Customer Success Manager

Duration: 1 Hour

CampusLogic Demo Kick-Off

Invite everyone who will be involved with StudentForms to see it in action.

We'll cover:

- How easy it is for students and staff to use StudentForms

Who should attend?

You bring:

- Anyone who will use or be involved with CampusLogic

We'll bring:

- Regional Director
- Customer Success Manager

Duration: 1 Hour

Technology Kick-Off

Talk through all integration touch points and your technical questions, ensuring the process goes smoothly.

We'll cover:

- Overview of desired integrations
- CL Connect integration option
- Formalizing integration requirements
- Integration scope for Go-Live

Who should attend?

You bring:

- Project Owner
- Your Tech Team

We'll bring:

- Customer Success Manager

Duration: 1 Hour

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STEP 2

STRATEGY

Basic Set-Up

Establish the basic settings for your account and begin to plan for how to customize future communications.

We'll cover:

- School users
- School settings: contact info, communication, documents
- Talk about customized communications so you can plan for your step 4 call

Who should attend?

You bring:

- Project Owner

We'll bring:

- Customer Success Manager

Duration: 1 Hour

Process Change

Discuss what will need to start, stop, and continue so that your team can thrive as they transition to mobile, paperless financial aid.

We'll cover:

- Your current process flow
- Your new process flow
- What you should start, stop, continue
- What Policy/Procedures you may want to adjust

Who should attend?

You bring:

- Sponsor
- Project Owner

We'll bring:

- Customer Success Manager

Duration: 1 Hour



STEP 3

COACHING

Student Experience Training

Walk through exactly what your students will experience when they start using StudentForms.

We'll cover:

- Student login, account creation, student task completion, parent e-sign, automated reminders
- Help-desk overview: student search options, student account page, student transaction page, knowledge base

Who should attend?

You bring:

- Project Owner
- FinAid Office

We'll bring:

- Customer Success Manager

Duration: 1.5 Hours

School Administrator Training

Walk through exactly what your financial aid office administrators will experience as they perform verifications.

We'll cover:

- Administration processes including: user login screen, account page, transactions page, student view tab, file review, reports and support

Who should attend?

You bring:

- Project Owner
- FinAid Office

We'll bring:

- Customer Success Manager

Duration: 1.5 Hours

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STEP 4

GO-LIVE PREP

Set-Up Communication

Establish customized language and timing for notifications and alerts intended for students.

We'll cover:

- Personalizing your student notifications and alerts

Who should attend?

You bring:

- Sponsor
- Project Owner

We'll bring:

- Customer Success Manager

Duration: 1 Hour

Hands-On Practice

Gain hands-on experience using test ISIRs loaded into your Sandbox. We'll practice, practice and practice some more.

We'll cover:

- Each administrator will perform verification of a test student
- Guided practice with your CSM—first hour
- Solo practice without your CSM—second hour

Who should attend?

You bring:

- Project Owner
- FinAid Office

We'll bring:

- Customer Success Manager

Duration: 2 Hours

Go Live!

You are now 100% ready to make financial aid awesome at your school. Don't worry, your CSM remains your main point-of-contact going forward and will continue to work with you to ensure your success with CampusLogic. Let's get out there and change students' lives!

campuslogic
campuslogic.com

