Pre-Implementation Client Guide

Please read carefully and complete each section prior to your Kickoff Call

Understanding Key Roles and Responsibilities

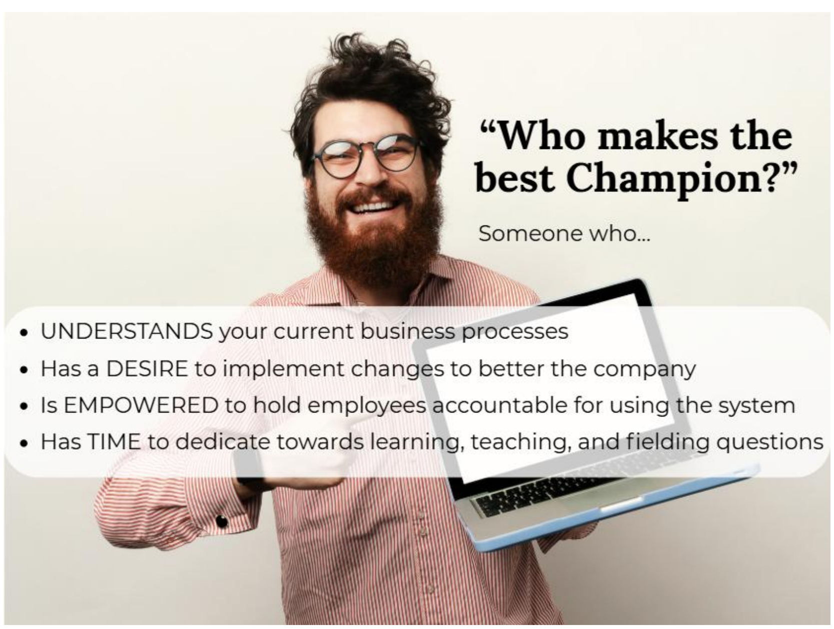
The improveit 360 team will consist of:

	OUR TEAM IS WITH YOU EVERY STEP OF THE WAY
Implementation Consultant	• Primary point of contact during your onboarding project • Your i360 subject matter expert - will work with you to set up your i360 system
Project Manager	• Secondary point of contact during your onboarding driving the project forward
Data Conversion Engineer	• Works with you to map and transfer data from your previous CRM system to i360
Sales	• The person you've been working with up to this point
Relationship Manager	• Your primary point of contact after your Go Live on improveit 360 • Long term point of contact

Your Team will consist of:

improveit 360 Champion

- Oversee the entire improveit 360 implementation.
- Primary point of contact for discovery, training, SOP discussions, coordinating schedules, and training your internal staff.
- Will actively be using the system day-to-day and assisting end users from all departments.



What does an i360 Champion do?

- Your Champion is your System Admin – NOTE: Due to SF restrictions, organizations are allowed only one (1) System Admin per 50 regular Users.
- This person should be available both before Go-Live and after, teaching your team the processes and critical system inputs related to their role within your organization. The Admin will need to be available to make system changes, troubleshoot issues, as well as set up new users.
- This person should understand your current business processes and be able to work with our i360 resources to interpret those processes into a new system. They may or may not be able to make decisions on major project items, but they have authority to make small/quick decisions to keep the project moving.
- This person should be in it for the long haul – setting up a new CRM is not a 'one and done' endeavor. Continued long term commitment ensures that system processes are carried out and maintained long term.
- This person will be the main resource for your team and employees on using improveit 360!
  - **Delegated admin** – there are SOME admin-only tasks that can be setup for non-admin users to perform. Ask your i360 team about this if you would like to discuss what can be delegated with this function (ex. setting up Marketing Source information, limited User setup, limited system configuration)

Additional Roles during the Implementation…

Key Decision Maker

- This person is the authority on major system decisions including financial decisions like: additional users, customization requests, user permissions, etc. (Usually Owner.)

Data Contact

- Works closely with improveit 360's Data Conversion Engineer to provide and prep data, determine field mapping, review data accuracy and provide detailed examples of any mapping discrepancies to address prior to final load.

Billing Contact

- Point of contact for billing questions or issues.

Who's on your team?

Tell Us, who are you assigning to the following Implementation Project Roles:

	NAME	EMAIL ADDRESS	TITLE
Champion			
Key Decision Maker			
Data Contact			
Billing Contact			

Do you have additional Roles you want to be invited to future training topics?

Please list additional management team members by department:

	NAME	EMAIL ADDRESS	TITLE
Marketing			
Scheduling			
Sales			
Accounting			
Production			

Pre-Setup Questions for i360 (please complete this section)

- How will your data be shared/segmented?
  - Ex. Territories can be setup based on customer zip code/county/state for reporting, scheduling, or visibility purposes
  - See the Set Global Territory Values article which has a downloadable Excel template used for inserting your Territories into improveit 360.

DESCRIBE HOW YOUR TERRITORIES ARE SET UP NOW

Pre-Setup Questions for i360 con't. (please complete this section)

- Does the company have multiple locations? If yes, is customer information shared between locations?
- Should Sales Rep Users' visibility be restricted?
  - Ex. Should Sales Reps only see their own appointments and sales?
- Are there any other special conditions required for some users and not others as far as visibility or system access/permissions?

DESCRIBE BRIEFLY HOW DATA IS SHARED/RESTRICTED

Get a Data Export from your CRM – send us your data ASAP!

- Determine if you plan to do a full data export or, if you have a large dataset spanning decades, you may choose to limit your dataset to a specific timeframe.
- Request full SQL backup from current CRM and Send data set to improveit 360

Is there anything specific we should note about your Data? Anything you are concerned about and want to relay to our Data Conversion Engineer?

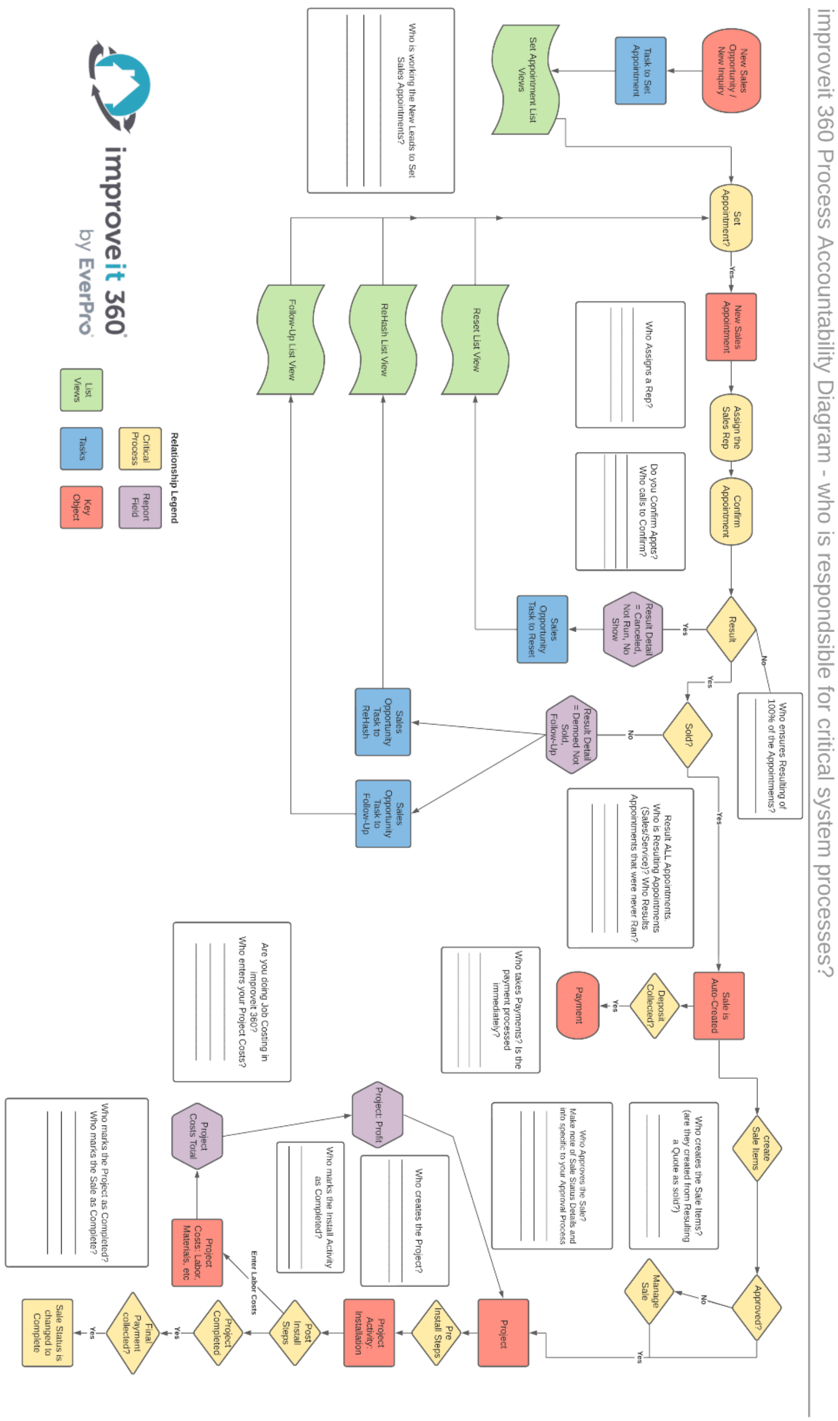
WHAT WOULD YOU LIKE OUR DATA TEAM TO KNOW?

Map of your existing Standard Operating Procedures (SOPs)

- Some companies have a process diagram depicting system inputs, tasks and critical system inputs completed by each department or role within your organization. Please send this to our team, if you have it.

Review improveit 360 Process Accountability Diagram

- Watch the Life of a Lead Walk Thru video with your entire team. Identify key team members or departments who will be performing these duties within improveit 360. Align current business functions to the critical system inputs for improveit 360. Print this out and write on it! A downloadable PDF: Process Diagram



Will you be using eLeads (electronic leads)?

Your marketing team should consider sending digital leads to improveit 360 from a web form or other lead providers like Angi Leads to give your team faster speed-to-lead and a higher chance of lead-to-appointment conversion.

- What lead providers do you use that will be sending data directly into improveit 360?
- Learn more about eLead payload formatting, setting up an eLead Endpoint and Standard eLead Fields.
- Note: Any lead providers that are not able to send data in the ways described above, Zapier may be a convenient option to integrate leads that are not formatted in a way improveit 360 can accept. NOTE: You are required to purchase and maintain your own Zapier account in this case, but your Implementation Consultant may be able to provide tips on getting started and which fields to map to within the system.

WHAT LEAD PROVIDERS WILL SEND IN DIGITAL LEADS?

Do you plan to have improveit 360 build out your Commission Structure?

Out of the box i360 commission tracking is manual. Some commission structures can be partially or fully automated with custom configuration set up by the i360 team. If you are interested in your commission structure being configured in i360, please provide examples and documentation of your commission structure and payout process.

See these Example Commission Scenarios as examples of the type of details we are looking for.

After 4/1 - Full Commission

Percent discount	Rate
0% - 15%	14%
16% - 30%	12%
31% - 35%	10%
36% - 40%	9%
41% - 50%	4.5%

After 4/1 - Veteran Full Commission

Percent discount	Rate
0% - 15%	15%
16% - 30%	14%
31% - 35%	12%
36% - 40%	10%
41% - 50%	5%

Do you plan to use improveit 360's Texting Component?

Texting Component Demo Video

- Your team can manually send text messages using the Texting component.
- There is a monthly recurring cost to use the texting component – if you are interested and have not already purchased this feature as part of your original contract, please reach out to your Implementation Consultant.
  - Each text/separate set of verbiage is considered a separate Text Template.
  - For an additional Setup Fee*, improveit 360 can also create automated text messages.

Examples of ways to use Automated Text Messaging*

DO YOU PLAN TO USE THE TEXTING COMPONENT? WANT MORE TEMPLATES?

Provide the below information to allow our team to complete the Twilio Texting Setup – we must register your Brand and A2P Compliance with the Twilio service provider:

TWILIO TEXTING SETUP REQUIREMENTS

EIN	
Company Legal Name	
Company Type (LLC., Corporation)	
Business URL	
Business Address	
Business Phone Number	
Business Contact	
Job Position for Contact	
Email Address for Contact	
Do you plan to send texts with embedded links or phone numbers?	NO

Text Messaging Setup Con't.

Specific Opt In messaging will need to be included on your company website. You will need to prove exactly how consumers consent to receive text messaging.

- Recent Approved Example: End users opt-in by going to [WEBSITE] and clicking on Free Inspection and entering their contact details including phone number. Before clicking submit, users must check a box to confirm they agree with the below message:

This Opt In verbiage will need to be added to your website BEFORE we can submit the registration request with Twilio (our texting service provider).

EXAMPLE OPT IN FOR TEXTING VERBIAGE:

You agree that by submitting this inquiry to [COMPANY], you consent to receive emails, calls, and text messages, including by an auto-phone system, from [COMPANY] to the email address and/or phone number you provided above to hear more about our sales and special events. Consent to receive these marketing emails, calls and texts is not a condition for purchase, and you can instead call us at [PHONE] to arrange for a free estimate. You may revoke this consent at any time by contacting [COMPANY] at [EMAIL] or, for texts by replying [STOP] to any text message. Messaging data rates may apply regarding texting. You have reviewed and agree to the [TERMS AND CONDITIONS link] of this webpage. Your personal information will be processed in accordance with our [PRIVACY POLICY link], and please be aware that all calls with [COMPANY] are recorded for quality assurance and training purposes. Message frequency may vary.

Provide your Website's Opt In language below (this needs to be the exact verbiage displayed on your company website:

WEBSITE OPT IN VERBIAGE FOR CONSUMERS

Next, please provide hyperlinks to both your Privacy Policy and your website Terms and Conditions. Twilio will review these to ensure you are within compliance. NOTE: If your Privacy Policy states that your business WILL share their information with another entity (such as Google Analytics), the registration will be rejected. Twilio does not allow ANY personal information sharing when using their Text messaging service.

Example of REJECTED Privacy Policy (do not share ANY Personal Information):

SHARING YOUR PERSONAL INFORMATION

We share your Personal Information with select third parties to help us use your Personal Information as described above. For example:

- We use Google Analytics to help us understand how customers use the Site. You can read more about how Google uses your Personal Information here: https://www.google.com/intl/en/policies/privacy/. You can opt out of Google Analytics here: https://tools.google.com/dlpage/gaoptout.

Next, you'll need to supply examples of specific Text Messages and the verbiage that consumers will receive in the text. Here are a few i360 examples:

Message Sample #1

Your appointment with [COMPANY NAME] has been scheduled for 12/15/25 at 2pm. [SALES REP NAME] is looking forward to meeting with you. Reply "C" to confirm.

Message Sample #2

Hi [CONTACT FIRST NAME], this is a friendly reminder about your upcoming appointment with [COMPANY NAME] on Monday. December 15th at 2pm.

Message Sample #3

Thank you for meeting [SALES REP NAME] yesterday! [COMPANY NAME] appreciates the opportunity to showcase our services and we hope to work with you in the future.

Provide your sample message(s) below:

TWILIO TEXT MESSAGE EXAMPLES

Review Out of the Box Features

This next section allows you to review the Out of the Box improveit 360 features like Reports, Documents and Email and Text Templates and determine if your business needs additional resources created that do not currently exist in the system.

Take your time! This section should be carefully reviewed. The more detailed notes and examples your team can provide our Implementation Consultant, the better our team can prepare, and the faster your project can progress.

Documents

Improveit 360 contains four (4) Document Templates. Here are examples of each and where they are generated from within the system: Document Templates

- They can be customized but require extensive knowledge of HTML coding.
- Do you plan to use any of the Out of the Box Documents? Is there any information you would want to be added/removed from the existing Template?
- Are there other documents you require to be generated from within improveit 360? If so, Document Templates are custom work – our team will need to review the document to determine if our team is able to build it within the system. There are file size limits on Document generation.

Does your company need Custom Document Templates created?

DESCRIBE THE DOCUMENTS YOU WILL NEED

Please provide examples of your existing Document Templates, or a mock up.

Reports and Dashboards

Improveit 360 has 15 Reports and one (1) Dashboard out of the box. Review the OOB Reports and Dashboard Guide. Your team will likely want to create Reports and Dashboards specific to your business KPIs.

DESCRIBE THE REPORTS/DASHBOARDS YOU WILL NEED

Please provide examples of any existing KPI reports/dashboards or excel spreadsheets you would like our team to try to replicate in improveit 360.Include examples of any formulas you use to calculate certain metrics (ex. Sum of Appointments Demoed / Sum of Appointments Set = Demo Rate %).

List Views

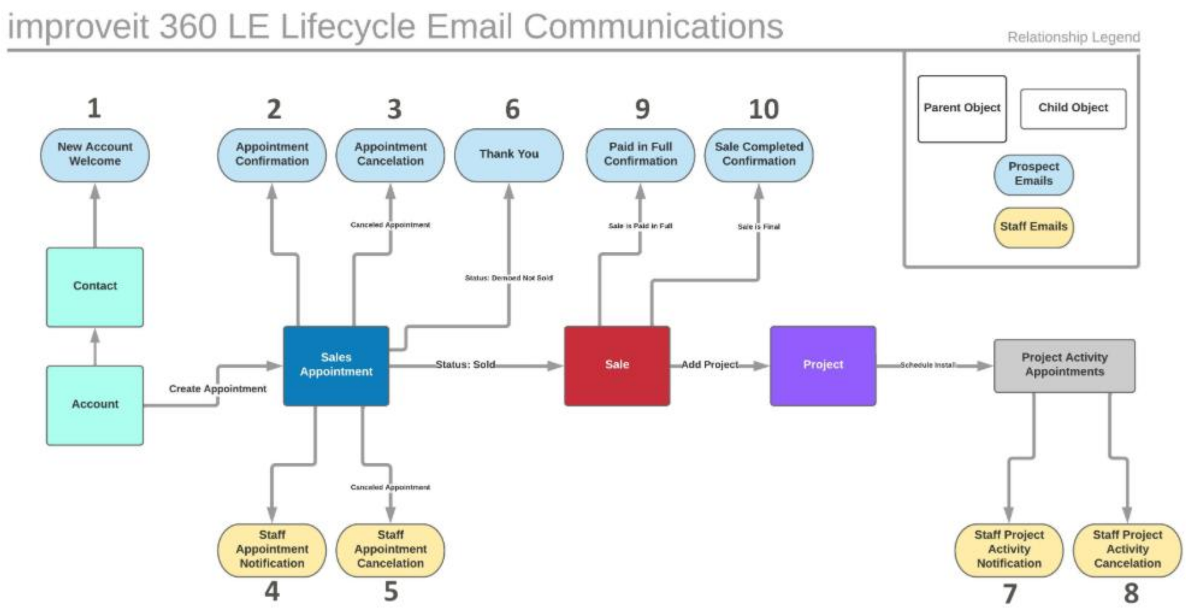
Review the Out of the Box List View Guide

- List Views are what your team will work from for their day-to-day respondsibilities. List Views are an easy way to organize records that all need the same type of action.
- Examples: Sales Appointments Tab > "Future Unconfirmed" List is used to call to confirm. While "Past without Result" are Appointments with a Date in the past but the Sales Rep needs to enter a Result.
- Examples: Project Activities Tab > "Tomorrow's Activities" shows any Project Activities with a Start date of tomorrow, but your team might want to create "Installation" or "ReMeasure" List Views to identify just those Activities.
- Review the List View Guide – what other list views might your different teams want to perform their jobs more efficiently?

DESCRIBE THE LIST VIEWS YOUR TEAMS WILL NEED

Review Out of the Box Email Templates

Next, you'll want to review the Lifecycle Email Communications Guide and when automated Emails are sent, based on specific user actions. NOTE: Email automations are not turned on, they will need to be Activated.



- All out of the box email templates and notes about which have pre-existing automation triggers around when they send. Email automations can be easily toggled on/off if you decide to use them.
- Which of the existing email templates and/or automations do you want to use as-is?
- Do you require verbiage to be updated on any Email Templates? See: How to Edit Email Templates *We strongly encourage your Champion to learn how to Edit your Email Templates.*
- Are there emails templates you require that are NOT on the list of Out of the Box Templates? (either for manual or automated sending)
- For any Custom Email Templates you want automated, when should those send out? Emails can be automated to send to customers, staff, or system users based on actions within your data entry processes.

Aside from the out of the box Email Templates and automation, tell us what additional Email Template automations you would like:

LIST CUSTOM EMAIL TEMPLATES AND WHEN THEY SHOULD SEND

Review Out of the Box Text Messaging Templates

Improveit 360 includes eight (8) out of the box Text Messaging Templates. These templates are sent manually from the texting component.

*NOTE: Text messages sent automatically are setup through a Flow automation (and do not utilize these 8 Text Templates). Additional Setup Fees apply.

#	Name	Type	Folder
1	Sales Opportunity - Sample	Email	Texting Templates
2	Sales Appointment – Appointment Scheduled	Email	Texting Templates
3	Sales Appointment – Reminder	Email	Texting Templates
4	Sales Appointment – 24 Hours After Appointment (Not Sold)	Email	Texting Templates
5	Contact – Follow-up Message	Email	Texting Templates
6	Sale – Payment Link Text	Email	Texting Templates
7	Project – Payment Link Text	Email	Texting Templates
8	Contact – Custom Feedback Request	Email	Texting Templates

- Do you require verbiage to be updated on any Text Templates? *We strongly encourage your Champion to learn how to Edit your Text Templates.*

Does your company want additional Text Templates besides these eight?

Does your company want to automate any of the Texts to go out automatically*?

LIST CUSTOM TEXT TEMPLATES AND WHEN THEY SHOULD SEND

If you have examples of text messages sent from your current CRM you'd like our team to replicate, please provide examples of those.

Review Standard improveit 360 Integrations

Improveit 360 and our partners offer a variety of integrations around lead data, quoting and sales. Review our approved Integration Partners and keep the following in mind:

- If there is anything you are interested in that was not part of your original contract, this is your opportunity to let your implementation team know! There may be additional setup fees for integrations not scoped in the original contract.
- Integrations not included on this list are *not* supported by our team and will need to be created custom by you and/or a third party. Testing, deployment, and maintenance will be owned by your team. Improveit 360 can provide more information about the Lightning schema, but is not able to modify or share proprietary information about our managed package (ex. Apex Triggers).
- Note: There are a lot of integrations and apps for Salesforce, but not all are plug and play. If you are researching a custom integration, keep in mind that it needs to work with custom objects in improveit 360's managed package. (See: Object Relationship Diagram – downloadable PDF at the bottom of the Article.)

WHICH INTEGRATIONS ARE YOU INTERESTED IN?

Additional Resources and Training Materials

We're almost done, I promise!

Next, we just want to give you some quick helpful reference links that you will use throughout the Project and after you Go Live with improveit 360!

How to Evaluate Your Data during a Data Conversion

Glossary of Terms by Object

Training Videos Library

Salesforce Mobile App Demo

Customizing the Mobile App for your Team

Using Time Block Scheduling - *things for Appointment Scheduling managers to start thinking about…*

- Rather than scheduling Appointment individually, Time Blocks can be created around either Capacity or Staff Availability.
- Capacity Availability is used when scheduling blocks of time available for a specific timeframe, product category, day of the week, or territory.
- Staff Availability is used when scheduling around individual Staff members. For specific schedules where reps can only run appointments at specific recurring times or days or the week.