

Onboarding & Implementation Overview



Kickoff Call



Integrate your
PMS/CRM



Product Settings &
Onboarding Form



Invite & Train
Your Team



Elise Internal Testing



Launch Day!



Learn and
Optimize



Kickoff Call

- ☐ **Establish Your Implementation Team**- Confirm Your Team and Ensure Kickoff Call Attendance
- ☐ **Introduction of Your EliseAI Team**- Meet Customer Success Manager, Account Executive, Solution Engineer + Support Teams
- ☐ **Overview of Partnership Goals**- Confirm Your Goals For Partnership, Align on Expectations & Important Metrics
- ☐ **Action Items and Next Steps**- Review Implementation Steps, Action Items, and Agreed Upon Go-Live Date



Integrate Your PMS/CRM

- ☐ **Integrations**- Access and Permissions Enablement For Your PMS and CRM (if applicable)
- ☐ **Voice Setup**- Configuration of IVR Tree
- ☐ **Integration Status Monitoring**-Task List Completion- Available on Launch Status Page of AI Portal
- ☐ **Automated Checkers**- Verification of Integration Status



Product Settings & Onboarding Form

- ☐ **Setting Configurations**- Configure Settings For Each Product (Leasing, Maintenance, Delinquency, Renewals, AI Guided Tours, etc.)
- ☐ **EliseCRM Settings**- Customize and Configure Settings (with the help of EliseAI's team)
- ☐ **Onboarding Form Completion**- Input Knowledge to Train Your AI (with the help of EliseAI's team)



Invite & Train Your Team

- ☐ **Invite Users**- Add Your Team to EliseAI and Assign Roles
- ☐ [EliseAI Training Library](#) - Video Courses
- ☐ [Live Group Trainings](#) - Zoom Webinars
- [Help Center Articles](#) - Helpful Articles and Resources
- [Additional Support](#) -Support Ticket Submission



Elise Internal Testing



Launch Day!

- ☐ **Announcement & Activation**- Email Announcement to Your Team and Activation of AI Assistant



Learn & Optimize

- ☐ **Ongoing Learning From Interactions**- AI Learning and Improvement Over Time
- ☐ **Optimization Programs**- Workflow Customization, Team Adoption, Managing Teams on EliseAI
- ☐ **Post-Launch Support & Monitoring**- Check-Ins, ROI Data, Performance Review, Audits, Ongoing Training & Support
- ☐ **Professional Services**- Centralization Services, Tech Stack Consolidation, Competitor Benchmarking, Ownership Co-Selling