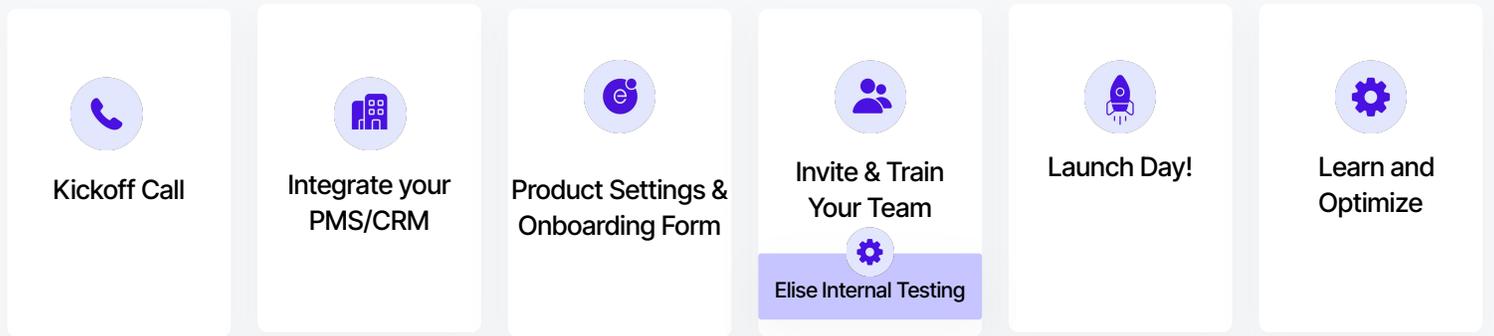


Onboarding & Implementation Overview



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 [Help Center Articles](#) - Helpful Articles and Resources
- [Live Group Trainings](#) - Zoom Webinars [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