Our top 5 tips for change management

When transitioning to myprosperity's client portal

1. **Start with why: Create a clear case for change.**

   Show your team how myprosperity can strengthen client relationships, streamline engagement and support more connected advice.

2. **Launch with impact: Build excitement and confidence.**

   Plan a clear, well-organised launch that prepares your team, engages clients and sets expectations from the outset.

3. **Start small: Scale with confidence.**

   Begin with priority features and a small client group, set measurable goals and expand your rollout as confidence grows.

4. **Prepare your team: Build knowledge and confidence.**

   Provide practical training so your team understands the platform, adopts new ways of working and can confidently support clients.

5. **Review and refine: Keep adoption moving.**

   Monitor progress, gather feedback and adjust your approach to maintain momentum and support lasting adoption.

The information in this communication is provided by myprosperity Pty Ltd (ABN 40 149 786 489), a member of the HUB24 Group, and is current as at 12 November 2026. While reasonable care has been taken to ensure the information is correct at the time of publishing, we make no representations or warranties as to the completeness or accuracy of the information and disclaim all liability for any loss arising from the reliance on this information.

myprosperity