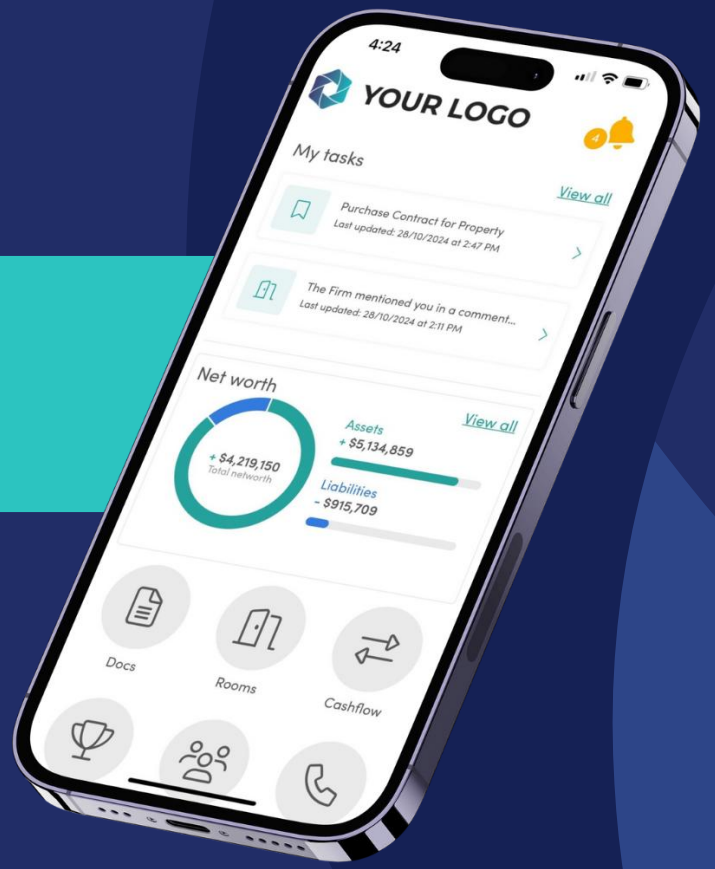
myprosperity

Welcome to myprosperity

Your guide to a successful onboarding journey



GETTING STARTED

Where would you like to go?

Click a title to learn more.



Welcome

Why you're here



What to expect

Your implementation journey



Training & resources

Participation & Feedback



Your commitment

Participation & feedback



Support

Support pathways

myprosperity

Welcome

We're excited to welcome you to myprosperity and support your onboarding journey.



Why you're here

This toolkit has been designed to help your team get up and running with confidence.

During onboarding you'll:

- ✓ Learn the fundamentals of myprosperity
- ✓ Complete guided training
- ✓ Access client-facing resources
- ✓ Discover implementation best practices
- ✓ Receive ongoing support from our team

What to expect

Your implementation milestones

Indicative journey only. Stage dates and durations will be confirmed at the kick-off session.

Welcome to your new client portal

Implementation & Roll-out Plan

Your practice and myprosperity to create and sign off on implementation and Roll-out plan.

Champion Training Session

Training session for **your practice** Champions and key team members.

Internal Launch

Your practice and myprosperity to launch myprosperity to **your practice's team**.

External Launch

Your practice to launch client engagement portal to their clients.

Post Implementation Review

Your practice and myprosperity to review implementation and discuss next steps.

Ongoing Relationship and support

Home

Next: Training & resources

myprosperity

Training & resources

Everything you need to get started

Click a title to learn more.



Training

Self-paced onboarding courses

- Setting up your portal
- Start working with clients
- **(Optional)** Collect information with digital forms
- (**Optional**) Collaborate in Rooms



Implementation toolkit

Guides, checklists and client-facing materials



Support team

For support, email our team at support@myprosperity.com.au. You can also use the chat box in your portal.



Partner help centre

Product guidance and FAQs

Your commitment

A successful onboarding experience is a partnership. These simple actions will set your team up for success.

Nominate a key contact to coordinate onboarding activities and communications. For sole operators, this may be you.

Complete your self-paced learning modules and encourage relevant team members to do the same.

Prepare the information and data required to support your implementation.

Participate in agreed implementation sessions and complete actions at a pace that works for your practice.

Support adoption within your practice by helping your team understand and confidently use myprosperity.



Our commitment

We'll tailor the implementation journey to your practice and provide the guidance, training and support you need to confidently implement myprosperity.

Support every step of the way

We're here to support your implementation and help you continue getting value from myprosperity after launch.

Customer Success Manager

Your primary contact for implementation guidance, planning and best-practice recommendations.

Technical Support

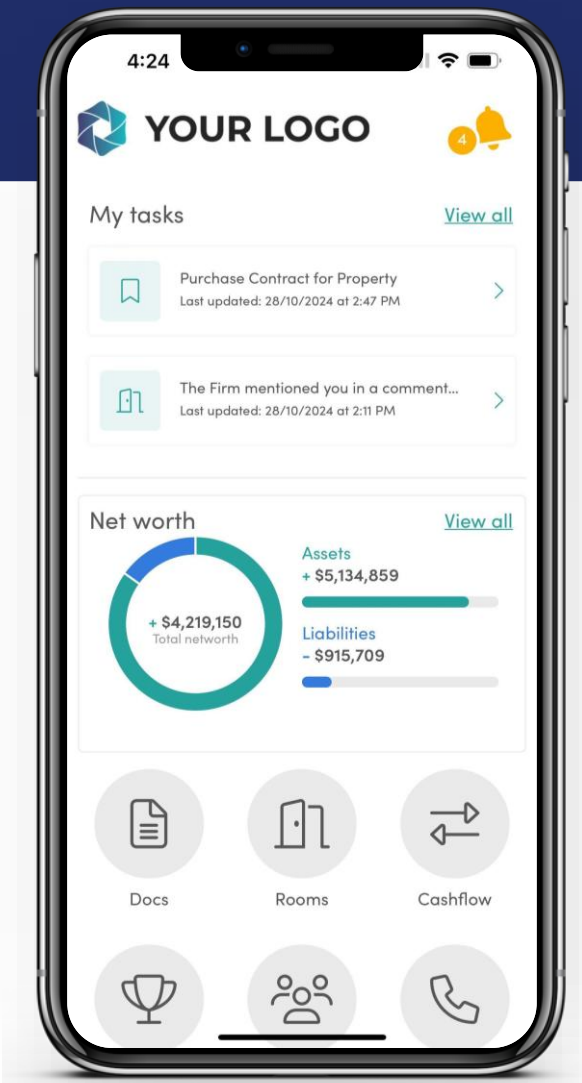
Help with platform questions, troubleshooting and technical issues.

Regular check-ins

Agreed touchpoints with your Customer Success Manager to review progress, address questions and identify next steps.

Continued success

Ongoing guidance after launch to support adoption, explore opportunities and help your practice get more value from myprosperity.



Home

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