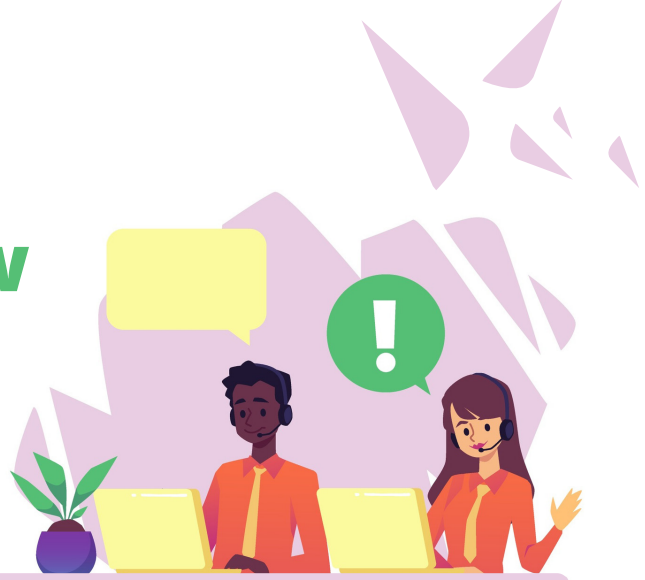


Onboarding Overview FOR YOUR NEXTREQUEST PLAN



A typical NextRequest onboarding rollout takes ~8-12 weeks and consists of two main parts.

Part 1:

Configure the portal to match your agency's process for responding to public records requests and set up agency-specific information such as:

- ☰ Users and departments
- ☰ Message templates
- ☰ Instructions for the requester
- ☰ Tags

Part 2:

Train users on how to manage and respond to public records requests. All training is recorded, so you can rewatch and share it at any time or join any of our ongoing weekly virtual training webinars.

- ☰ **One administrator training with a launch manager** for those managing the portal
- ☰ **One staff training via webinar** for staff users responding to records requests

Keys to a Successful Rollout

Designate A Primary Contact

Choosing someone who is involved in responding to public records requests frequently is ideal.

Clearly Map Out Processes

This is a vital step. Mapping out current processes as well as desired changes is the foundation of a successful rollout.

Set Training Dates Early

This will help ensure maximum attendance for your administrator and staff trainings.

Standard 8-Week Rollout Timeline

STAGE	WHEN	WHO	ROLLOUT
STAGE 1	Week 1	Key Stakeholders	Process Mapping: Fill out customer success plan, gather information, and add users, departments and portal images.
STAGE 2	Week 2	Key Stakeholders	Kickoff Call: 30 - 60 minute meeting to outline the onboarding and training process and set a go-live date.
	Weeks 2 - 3	Portal Administrators	Gather Information for Portal: Finalize users and departments list. Update templates, alerts, tags, and custom text.
STAGE 3	Week 4	Portal Administrators	Administrator Training: 60 - 90 minute meeting for users who will be administering the portal and managing records requests.
	Week 6	All Staff Users	Staff Training: 60 minute training for staff who will be responding to record requests within the portal. Note: This Staff training is via Webinar only.
STAGE 4	Week 7	Communication Team	Go Live: Your agency's portal is now live and available to the public.
	Weeks 8 - 12	Portal Owner(s)	Check-in Review: Compare the first month of NextRequest usage against 30-day success goals and how you are using NextRequest.

Our Promise

Our team is dedicated to giving you the best experience in customer support. If your team changes, if your process changes, or if your agency evolves, we're here to help you transition and get you back on track.