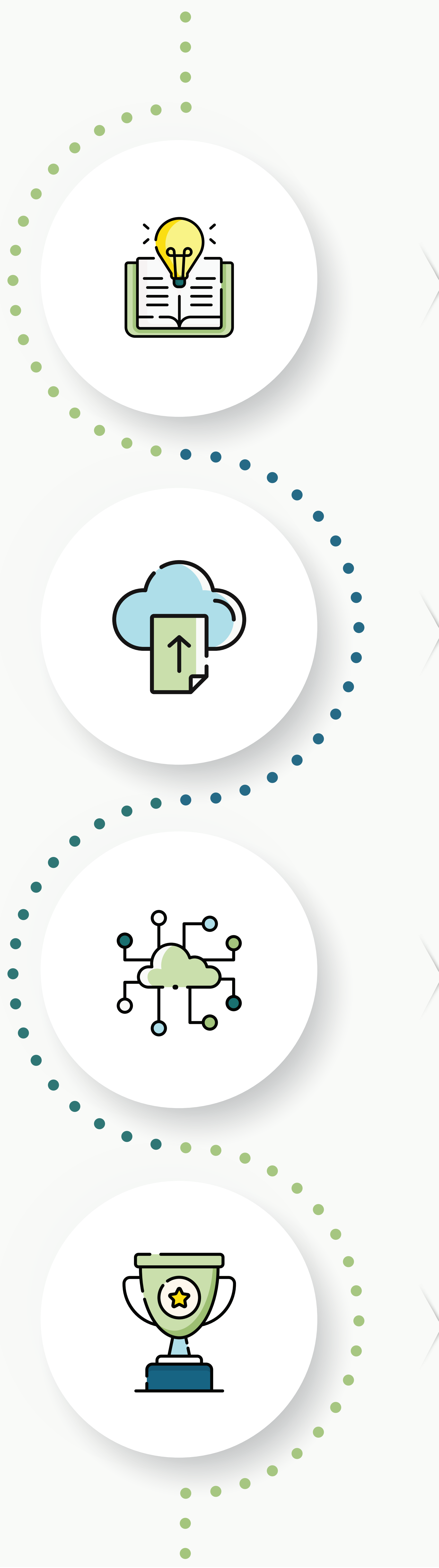


OpenAsset Onboarding Plan



1

Education

Setting attainable goals and timelines for your firm's onboarding as well as learning the basics of the system.

- [Kickoff Meeting](#)
- OpenAsset System Overview
- [Template Overview](#)
- Planning & Strategy Call

2

Migration

Prepare your content for upload into OpenAsset through a migration. *(Manual upload is always an option for smaller scaled goals).*

- Prepare and/or organize content into an appropriate format to be migrated
- Delivery of content to the OpenAsset Team
- OpenAsset Team initiates migration service
- Post-Migration review with your Implementation Manager

3

Configuration

This is where our clients personalize and customize their system. In this phase we both teach and assign action items to ensure the system is in a healthy starting place and is shareable to new users.

- Review [Hero Images](#) and [Project Locations](#)
- Fill in any gaps in Project Keywords
- Finalize [Taxonomies](#) (Project and File)
- Start to apply File Keywords (and make a plan for the future)
- Review [Access Levels](#) and Marketing Preference
- [Custom Image Sizes](#)
- [Indesign Plug-In](#) (if applicable)
- User Management or Single-Sign On
- [Groups and Permissions](#)

4

Transition to Adoption

Your Implementation Manager will take a step back and your project team will interact with the Customer Success Team to plan out your vision for training, rollout, and iron out your workflows before launching the system.

- Introduce you to the Customer Success Team
- Discuss work-flows and adoption plan for OpenAsset
- Strategize and plan for training new users
- [Official rollout](#) of OpenAsset