

Implementation Timeline



Implementation Phases

➤ PROJECT KICK OFF

- Welcome
- Meet Project Management Team
- Implementation Preparation Checklist

➤ PLANNING

- Confirm Project Timeline
- Design Session
- Receive Initial Data
- Introduce Client Success Team
- GOlearn

➤ PREPARATION

- User Setup
- Build Sandbox
- Sandbox Training
- Design and Configuration
- Scope of Work
- Process Review and Signoff

➤ IMPLEMENTATION

- Refine Design and Configuration
- Final Data Preparation and Import

➤ APPROVAL

- Final Data Setup Approval
- Final User Setup Approval
- Go Live Signoff

➤ GO LIVE

- Celebrate
- Transition to Account Management Team

With more than 40 years serving grantmakers, our mission remains the same...to support foundations and power philanthropy, making it better along the way.