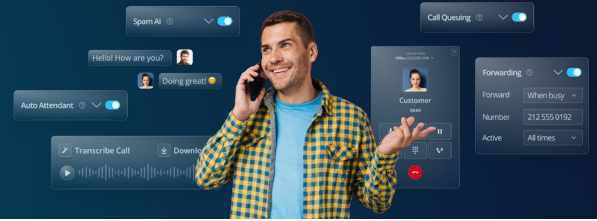


# Customer Success Roadmap



## Order Processing

1

- 1 Order received
- 2 Onboarding Team is notified
- 3 2talk Implementation Specialist assigned
- 4 Order review
- 5 Account setup begins

Award-winning service

2

## Customer Kickoff

- 1 Customer contacted for order review and confirming requirements
- 2 Outline and agree scope and timeline
- 3 Customer completes onboarding document, including number porting LOA

## Pre-Implementation

3

- 1 Set up account in 2talk systems
- 2 Send Account Setup (Welcome) email to customer (create password and add credit card)
- 3 Hardware ordered and shipped (where applicable)
- 4 Initiate number porting (if needed)
- 5 Gather customer data (eg, user information, phone numbers, settings requirements)
- 6 Prepare Cloud PBX configuration plan
- 7 Confirm number porting schedule FOC dates

Works with all your devices

4

## Implementation

- 1 Pre-provision numbers onto customer account
- 2 Hardware & device provisioning
- 3 Build out call flows and IVR structures
- 4 Configure users and telephone numbers, and assign them
- 5 Set up voicemail, auto attendants and other requested features

## Train, Test, Go-Live

5

- 1 Schedule and conduct training session
- 2 Live walkthrough of features and set up with customer
- 3 Perform final checks and adjustments
- 4 Complete number porting (if applicable)
- 5 Go Live

Go beyond calling with messaging and video

## Follow-Up

- 1 Post-implementation call to customer
- 2 30-day satisfaction survey

Get in touch with us today!

Contact your account representative, visit [2talk.com](https://2talk.com) or call us at 1 800 283 1332.