Onboarding with AgilLink[SM]

With over 300 family offices, business management, and accounting firms on AgilLink, we have identified key best practices that have accelerated the pace of adoption and enjoyed ongoing success.

We have used these insights to design our onboarding process, and to match your firm with a dedicated team of knowledgeable industry experts to lead the way. The three keys to a successful implementation are:

1. Clear assignment of internal roles to lead organizational change
2. Agreed upon milestones
3. Ability to transition from onboarding to ongoing support

Meet your dedicated team of family office experts:

ACCOUNT MANAGER
New user licensing and contract coordination

CLIENT SUCCESS MANAGER
Consultant for implementation and high level firm matters like mergers and acquisitions

HELP DESK
Ongoing support from the AgilLink Team

The AgilLink Community gives you 24/7 access to:

- Knowledge base of articles and documentation
- Learning plans and tutorials
- Forms
- Release Notes
- Contact center cases

AGILLINK
AN RBC COMPANY

Build your internal implementation team, set roles and responsibilities

Executive Sponsor
- Defines vision for the firm
- Reinforces the positive message for change
- Acts as critical decision maker

System Administrator
- Trusted team member to create users, roles and approval workflow
- May assume additional set up tasks based on your policies
- Available to reset passwords or lockouts
- Internal experts for first line questions (unique to firm processes and procedures)

Champion
- Reinforces the vision and message of the sponsor
- Point person for AgilLink Client Success Manager
- Assigns setup tasks and required training
- Monitors timelines and dependencies
- Ensures target delivery on timelines

Knowledge Manager/Trainer
- Able to cascade procedures and firm best practices
- The team that escalates to the AgilLink Help Desk
- “Train the Trainer” model

Project Planning

- Prepare communication plan and deliver positive change message
- Finalize approach for charts of accounts
- Build in adequate time for knowledge development and training delivery for system administrator and users
- Determine phased approach and number of phases needed to allow for system setup

Pilot and Phased Rollout by Client or by Desk/Role

- Set up and train the System Administrator and users
- Sandbox simulation
- Process flow testing
- Review and adjust
- Signoff
- Readiness checkpoint

Go-Live & Ongoing Support

- Scheduled regular post-implementation checkpoints
- Transition internal implementation team to ongoing internal support team

Application Owner / Lead Admin
- Lead administrator who understands the application and business needs
- Key point of contact with AgilLink on prioritization of key feature needs, rollout of new features and major activities
- Defines standards and roles for system administration and procedures for internal user support

Systems Administrator / Internal Support Team
- Ongoing setup of users roles, approval workflow & delegation, financial statement style setup, digital signature prep and upload, release token management, custom category management
- Respond to firstline user questions
- Add GL accounts to template charts
- Escalation to the AgilLink Help Desk

Knowledge Manganger / Trainer Roles
- Onboarding of new employees
- Interface with tailored trainings
- Knowledge Management to tailor to internal firm processes

With these strategies and dedicated support from our team, we are confident in your firm's ability to maximize the benefits of AgilLink and achieve lasting success in managing your bill pay and accounting operations.