

FIREWALL TRANSITION PROCESS

Our Firewall Transition Process rigorously guards your professional reputation, client relationships, and focus on priorities, so transitioning can simply be the start of something great. We provide a comprehensive approach that includes meticulous attention to detail, the industry's lowest error percentage, and a robust communication program so your move is a win for all parties.

Specification



We craft a thorough and customized plan that intersects your specific training, tech, and client communication needs with specific on-boarding timelines.

- Review Welcome Kit
- Complete Intake Form
- Discuss Agreement Terms
- Design of Action Plan



Verification

- Approve Action Plan
- Approve Agreement Terms
- Signing Ceremony

Together, we review and adjust the elements of your plan and formalize our agreement of shared responsibilities, work routines, timelines, and communication protocols.

Activation



We attack the plan by preparing every single detail prior to migrating. We initiate all pre-flight client communication plans including on-boarding events, webinars and emails. We finalize all documentation and activate all technology components and trainings for your team.

- Registration Approval Review
- Complete Affil/Reg Fee Form
- Elements Training/Certification
- Data Submission for Migration



Migration

- Migration Completion/Support
- Elements Account Access
- Action Plan Steps Review
- Sales Support Materials Training
- Marketing Program Introduction

We breach the firewall and initiate full migration protocols beginning with client communication, trouble ticket management, and ad hoc service requests. Fusion reps support you at every step including training videos, webinars and dedicated support and escalation procedures.

Validation



During the period following the initial migration, a total process audit and review is conducted to ascertain any gaps to be filled and progress attained. We pursue our shared goal of seamless integration until it is achieved.

- Migration Audit
- Continued Training
- Staff Support
- Advisory Coaching Program Intro

THEY SAY CHANGE ISN'T EASY, BUT YOUR TRANSITION DOESN'T HAVE TO BE DIFFICULT. LET FUSION'S FIREWALL TRANSITION PROCESS GUIDE YOUR BUSINESS TO A BETTER TOMORROW.