**Phase #1 Welcome Call with Client Success Director**

* Upon signature of the contract a Welcome/Getting Started call will be scheduled with the main contact at the bank & the Client Success Director.
* This will be followed by a email requesting a bank logo and approval on url selection.

The Bank’s IT Department requirement:

* + The IT Department will need to allow the agreed upon url to be accessed by bank employees. The IT Department will need to whitelist the @bankname.realwired.com and [no-reply@bankname.realwired.com](mailto:no-reply@bankname.realwired.com) email addresses.
* Realwired will then coordinate a kick-off call (45 minutes in length). Bank will want key decision makers to attend the kick-off call as we will discuss timeline (Go Live date), onboarding call cadence, etc.

**Phase #2 Customizing the YouConnect Site**

* This can take 3-4 weeks to complete the configuration of your YouConnect site. This will consist of a combination of calls and documentation being sent with instructions on how to complete the specific configuration. Client to coordinate internal meetings with team member(s) that need to be involved to answer the specific configuration questions.

**Phase #3 User Setup**

* Realwired will complete User setup with client to determine roles & permissions. A User Import Workbook is then sent to the client to fill in all users who will need access to YouConnect and Realwired will import the users.

**Phase #4 Appraisal Department(Job Manager) training session & UAT (Once initial configurations are completed)**

* Realwired will provide Job Manager training.
* User Acceptance Tested is completed by the Banks Admins/Appraisal team.

**Phase #5 Vendor Management**

* Realwired will complete Vendor setup with client. A Vendor Import Workbook is then sent to the client to fill in and Realwired will import vendors to the YouConnect site.
* Determine if Vendor Credential Monitoring will be implemented (this can add on an additional 2-3 weeks to the implementation timeline).

**Phase #6 User Training**

* RW will host 2 lender training sessions, the bank will coordinate and send the invites to the attendees, we ask the bank to record at least one of these calls to provide to lenders.