

CI HUB ONBOARDING: YOUR 4 WEEK SUCCESS ROADMAP

PHASE 1: SETUP & DISCOVERY

Once the Pilot Agreement is signed, your 30-day trial is activated and these steps begin:



Day 1: Initial Data Setup Call

Day 2: Reporting Xpress Set up & Segmentation



Day 3: Client Review of Insights & Data Validity



Day 4: Live Meeting - *this is where it gets fun!*

- Review Waterfall Analysis
- Experience the AI Navigator
- Walk Through Playbook

***Days 1-4 can often be compressed into as little as ONE DAY!!*

PHASE 2: INSIGHTS & ACTION

Weeks 2 & 3: Client Executes Recommended Action Card Strategies



Week 4: Collaborative Meeting: Review Performance Metrics & Trial Outcomes



**NEXT STEP: COMPLETE SAAS AGREEMENT
TO CONTINUE SEEING RESULTS**

