

Corporate Visions

Disclaimer: This Implementation Overview provides an estimated, milestone-based timeline. It is intended as a general guide for delivery and does not create any binding obligations or liability for Corporate Visions (CVI) with respect to meeting specific deadlines.

Implementation Overview

(Estimated time to be completed 6–7 Weeks)

Phase 1: Pre-kickoff

- Confirm surveys/interviews approach
- Identify key contacts (Executive Sponsor, IT/CRM)
- Provide branding and business objectives
- Share required lists: Users, Opportunities (90 days), Product & Competitor
- Confirm domain authorization and SSO approach

Phase 2: Kick-off Call

- Confirm receipt of deliverables
- Align on client objectives and success criteria
- Review interview setup guide
- Agree on meeting cadence

Phase 3: Setup & Training

- Finalize solution criteria & domain setup (incl. SSO)
- Approve email outreach and sample outreach testing
- Conduct training with dummy data
- Test product functionality and capture feedback
- Hold training event with client team
- Before go live – Test outcomes and outreach parameters

Phase 4: Live

- Launch surveys and/or interviews
- Begin regular cadence with dedicated CSM
- Adjust interview guide if needed.