

# Getting ready for Updater Pro | Onboarding

## Questions to answer

### **What are my goals for Updater Pro | Onboarding?**

Consider these examples:

- My residents submit move-in documents via Updater
- My leasing teams save time
- My leasing teams generate revenue from preferred provider service purchases through Updater
- Resident satisfaction with Updater
- Leasing team satisfaction with Updater

### **Who should be involved?**

- Who can speak to the day-to-day move-in operations of your leasing teams?
- Who oversees on-site operations for your company?
- Who is involved in approvals for process changes on-site?
- Who is familiar with email communications that are sent to approved applicants and future residents today?
- Who handles training & education for new software internally?
- Who handles technical details for your property management system (Yardi, Entrada, RealPage, etc) and APIs?
- Who will lead the Updater rollout for your portfolio of communities?

## What is your configuration approach?

*Each community needs to be configured in Updater. This takes most teams less than 10 minutes per community.*

- Recommended approach: corporate or regional leads are responsible for attending configuration training and completing the configuration of multiple properties.
- Alternative approach: One person from each community is responsible for attending configuration training and completing the configuration for their community.

While every organization and community may have different data & details that will be essential to a successful Updater configuration, it's important to start collecting and organizing these details as early as possible to keep your implementation on track.

Your Onboarding Form should be completed as soon as possible to help speed up configuration. Once complete, an implementation specialist will import your details into your Updater experience.

## Who will attend training?

Your teams will have access to a variety of training and enablement resources to ensure they are prepared for the Updater rollout. There are 2 key training tracks during Updater implementation:

- Community configuration - learn how to configure a community in Updater
  - Audience: Admin-level roles only
- Resident management - learn how to manage resident tasks and send your welcome letter in Updater
  - Audience - Onsite teams