







# WHY IS **equip** SO UNBELIEVABLY DELIGHTFUL?

Simply put, 'cause you won't have to do much!

Uncover the **equip** roadmap showing you the simple milestones to create **compliance success**.

EQUIP MILESTONES

		WE WILL ...	YOU WILL...
1	<b>First Things First</b>		
		<ul style="list-style-type: none"> <li>Create your account and marketing materials</li> <li>Set up a next steps call</li> </ul>	<ul style="list-style-type: none"> <li>Send us a high-resolution file of your agency logo</li> <li>Keep an eye out for a special surprise in the mail from the CD team!</li> </ul>
2	<b>So You'll Know Our System</b>		
		<ul style="list-style-type: none"> <li>Equip your account support team to manage clients</li> <li>Equip your sales team on how to sell compliance to prospects</li> </ul>	<ul style="list-style-type: none"> <li>Show-up to your journey towards compliance simplicity</li> </ul>
3	<b>Welcoming Your Clients</b>		
		<ul style="list-style-type: none"> <li>Add all clients into the system</li> <li>Equip clients to dominate compliance on a quick and painless (30 min or less) webinar</li> <li>Email webinar invites to clients and manage registrations</li> <li>Host webinar</li> <li>Send you a client usage report after the first 30 days</li> </ul>	<ul style="list-style-type: none"> <li>Complete setup form for each client</li> <li>Attend the training demo</li> </ul>
4	<b>Maintain and Manage</b>		
		<ul style="list-style-type: none"> <li>Set up bi-weekly check-ins with you to monitor progress</li> <li>Answer all client questions about the system</li> <li>Expand on the law and compliance content</li> </ul>	<ul style="list-style-type: none"> <li>Send us client questions</li> <li>Add compliance to your regular check-in agenda</li> </ul>
5	<b>Progress Check-In</b>		
		<ul style="list-style-type: none"> <li>Conduct a mini assessment of client usage and progress</li> <li>Create a tailored plan to keep clients on track</li> </ul>	<ul style="list-style-type: none"> <li>Show up with your questions and ideas</li> </ul>
6	<b>Annual Assessment</b>		
		<ul style="list-style-type: none"> <li>Review how the year has gone, celebrate your successes, and discuss how we can make the next year even simpler and better for you.</li> </ul>	<ul style="list-style-type: none"> <li>Congrats, you have completed one year of compliance with us!</li> <li>Consider how you can up your compliance game to serve your clients even better.</li> </ul>



The Most Delightful Training & Support System Ever™