RightCapital Client Portal Launch Checklist

Like most things in life, planning is everything. That is why the first several steps are *preparing* to introduce your portal to your clients and *then* introducing it. To grab the highlights, watch Presenting RightCapital to your clients.

☐ Understand it from my client's perspective

Understand it from the client's experience. Get in your client's mind.

- ☐ Action: Add yourself as a client (Creating plans)
- ☐ Action: Write a proposal for yourself (Multiple scenarios and Retirement video)

☐ Preparing to introduce your portal

Email or in-person? How much do I share? Which talking points do I use? We all want to lead with the best foot forward — use these tips to ensure you're ready with your clients.

- ☐ Training: Know your portal's value proposition (Best practices and talking points)
- ☐ Training: Decide how to introduce my portal (Introducing RightCapital)
- ☐ Action: Determine what's enabled in your client's portal (Granting access)

☐ Brand my portal (Brand RightCapital your way)

☐ Invite my clients to their portal

This is the big reveal! By now we understand it from the client's perspective, we know the benefits, and we've dialed in the experience. We are ready to expand the portal beyond just a few clients.

- ☐ Action: Pre-fill your client's basic information
- ☐ Action: Ensure your client has the right access (Granting access)
- ☐ Action: Send introduction email or client meeting (sample email messaging)
- ☐ Action: Invite clients to their account (Inviting clients)
- ☐ Action: Share resources to guide them step-by-step (client-facing resources)
- ☐ Action: Invite clients to use your mobile app (video and article)

☐ Metrics: Track clients' progress (article)

All set? Now deliver an exceptional experience!

Got questions? Email support@rightcapital.com or chat with us!