Pre-Implementation Checklist

Thank you for choosing Go Icon as your communication and engagement platform! We're excited to help your senior living community connect with staff, families, and residents.

To ensure a smooth implementation, we've created a Pre-Implementation Checklist to guide your team during the lead-up to kickoff. Completing these tasks will help us tailor the platform to your needs and ensure a strong start.

At the end of this checklist, you'll find a button that takes you to a page where you can upload any of the articles listed below.

1. Complete Your Team Contact List

- **Purpose:** We'll need to know who will be involved in the implementation and training process.
- **Action:** Please fill out the linked **Team Contact List** sheet with the key members from both your corporate and community-level teams who will participate in training and implementation. This will help us ensure we include the right people in training and communication sessions.
  - Corporate Team: Project managers, marketing and/or communication teams, executives, etc.
  - Community Staff: Admins, life enrichment staff, communication leads, caregivers, family liaison, and others.

2. Vendor Introductions for Integration

- **Purpose:** Many senior living communities work with third-party systems (e.g., EMR, CRM, payment systems), and we want to ensure smooth integration.
- **Action:** Please provide contact details for any vendors or third-party systems that will need to integrate with Go Icon. We'll reach out to ensure compatibility and a seamless connection with our platform.
  - Include vendor names, system types, and contact information.
- **Important Note:** To ensure a smooth integration with Go Icon, it's crucial to maintain clean data in the system you're connecting. We recommend updating resident and staff names, demographics, and contact information before integration.

3. Provide Your Brand Assets

- **Purpose:** We want our products to reflect your community's unique brand identity.

- **Action:** Please share your brand assets (logos, colors, fonts, etc.) so we can personalize the platform to reflect your organization's look and feel.
  - High-resolution logos and images with a transparent background
  - Brand color codes (Hex/RGB)
  - Custom fonts and any other relevant design materials

4. Define User Roles and Permissions

- **Purpose:** Go Icon allows for different roles with varying access levels, ensuring security and control. Here is a template for you to use to build our these user permissions.

- **Action:** Please review the list of users in your organization and define the roles and permissions they should have in the system:
  - Who should have admin access?
  - Which staff members should have user access?
  - Identify any other specific roles or permissions (e.g., content managers, family liaisons)

5. Select Pages for Community Engagement App Launch

- **Purpose:** We want your senior residents and their families to have easy access to important information.

- **Action:** If you are using Go Icon's Community Engagement product, please start to identify the pages you would like to have available to residents upon app launch. These pages could include:
  - Community Calendar | Daily Menus and Dining Options | Staff Directory | News and Announcements Resident Directory | Any other community-specific content you want to include (e.g. In Memoriam , Resident Committee Meeting Minutes, Welcome New Residents to name a few)

- **Important Note:** Let us know if you'd like assistance in determining the best layout or types of content to feature.

6. Review Technical Requirements & IT Setup

- **Purpose:** Ensure your IT environment is ready for integration with Go Icon.
- **Action:** Review the technical specifications and ensure your system is ready for Go Icon's platform. This includes:
  - System prerequisites (e.g., supported browsers, network settings)
  - Any necessary hardware or software configurations
  - Coordination with your IT team for any integration tasks or access needs
  - Will staff be using desk tops or mobile devices. If mobile devices have they been purchased.

7. Set Up a Communication Plan

- **Purpose:** Effective communication is key to a successful implementation.
- **Action:** Define your primary point of contact and establish a regular communication plan with our team:
  - Who will be the main point of contact for implementation-related questions?
  - Set up regular check-ins (e.g., weekly or bi-weekly) to track progress
  - Choose your preferred communication channels (email, Slack, project management tools)

8. Plan for End-User Training

- **Purpose:** Ensure your team and residents are ready to use the platform.
- **Action:** Consider the logistics of training for both staff and residents:
  - Identify which staff members need training and on what topics
  - Determine the best format for training (live sessions, recorded tutorials, in-person sessions)
  - Review any pre-existing training materials or documents that would be helpful
  - If you are training residents, consider factors like room setups, resident schedules, or language needs

Upload Your Files Here