ADOPTION First 3 to 6 Months

PRE-ONBOARDING

Gale	Your Team
Your Gale Sales Consultant will send you an email introducing you to your Customer Success Manager.	☐ **Gather Internal Stakeholders** who need to be involved in the onboarding (technical staff for access, contacts who will be promoting to teachers/users, etc.). ☐ **Schedule Onboarding Meeting** using the Customer Success Manager's link (found within your initial email). ☐ **Brainstorm goals** for your new resources at 3 months, 6 months, and 1 year.

TECHNICAL IMPLEMENTATION

Gale	Your Team

The Gale Electronic Access Team will send you an email with links to all of your new databases and the access code to authenticate.	☐ **Respond to the Access Email** if you would like to utilize IP Authentication on campus. Include your IP address or range in your response.
	
	☐ **Determine any other authentication methods** you would like to enable and prepare this information for your Onboarding Meeting. Gale can support onboarding with:
	  ✓ Updating your access code to something unique and easy for students to remember
	  ✓ Google or Microsoft SSO, ClassLink, Clever, Canvas, Schoology, etc.
	
	☐ **Add links to your website**, wherever students and teachers typically access virtual resources.
	  ✓ Add your access code to the location students access for their passwords (example: access protected Google Doc).
	
	☐ **Determine if there are any other locations you would like to place your links**, like and LMS or another site. Bring this list to your Onboarding Meeting.

ONBOARDING

Gale	Your Team
☐ Gale Customer Success Manager will ask questions regarding your goals needs, access, and support, to create a success plan. ☐ Gale CSM will schedule next meeting to follow up on your usage and goals.	☐ Engage with **Success Planning Conversation**. ☐ After meeting take appropriate steps to **achieve goals**. ☐ Prepare any information you want to share with your Gale Trainer. ☐ **Browse the Support Site** for marketing and best practice tips.

TRAINING ASSESSMENT

Gale	Your Team
☐ After onboarding, a Gale Trainer will schedule a meeting with you. ☐ The will work with you to assess your training needs.	☐ Identify a common time and place for optimum attendance ☐ **Market** the training

‹›⁎ GALE