

A decorative graphic on the left side of the slide consisting of several parallel diagonal stripes. The stripes alternate between a bright yellow color and a black color, creating a high-contrast, geometric pattern.

Onboarding Conclusion

Onboarding Plan

Step 1: Get ready

- Determine the BRC
- Set the onboarding goal
- Review roll-out best practices and resources
- Confirm your account set-up & dashboard know-how

Step 2: Get set

THIS WAS LAST TIME

- Goal progress check
- Dashboard review
- Roll-out Q&A
- Referral strategy prep

Step 3: Go

THIS IS TODAY

1. Onboarding goal + dashboard review
2. Set strategy and goals for next 3 months*
3. Onboarding survey
4. Referral incentive
5. Continued support resources

*Practice decision makers should be at this meeting.



Onboarding goals & dashboard review



ONBOARDING GOALS

3

Referral sources
categories

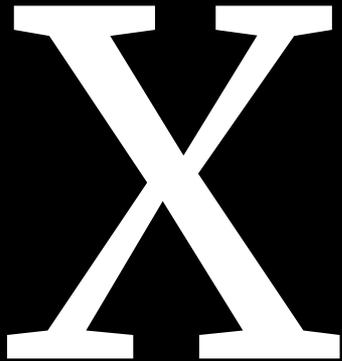
3

GP or referring
practices live

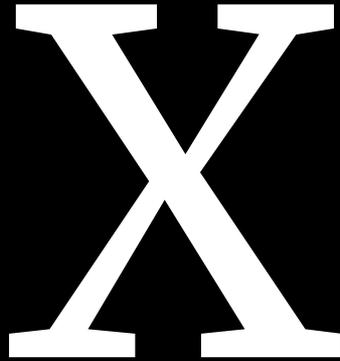
3+

Referrals sent from
each source

CURRENT PROGRESS

A large, bold, white 'X' mark is centered within a rounded square frame with a red border.

Referral sources
categories

A large, bold, white 'X' mark is centered within a rounded square frame with a red border.

GP or referring
practices live

A large, bold, white 'X' mark is centered within a rounded square frame with a red border.

Referrals sent from
each source

CURRENT PROGRESS

Activity

CURRENT PROGRESS

Referral Source

CURRENT PROGRESS

Needs attentio

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Set strategy & goals for
next 3 months

2

Now that onboarding is complete, we can think about what you hope to accomplish with Bright Referral long term. We'll use the details you shared in the strategy form.

Let's look at our

Strategic Referral Tracker.



Next steps

3

Onboarding survey

We are always improving and would love your feedback.

Please fill out this survey.

Referral incentive



LOVE BRIGHT REFERRAL?

TELL YOUR FRIENDS!

*\$50 credit applied to your next statement for every referral that becomes a new customer.

**\$50
CREDIT**

The graphic features a black background with two yellow lightning bolts at the top. The text 'LOVE BRIGHT REFERRAL?' is in pink, 'TELL YOUR FRIENDS!' is in large cyan letters, and the asterisked note is in small white text. A large, stylized red and pink mouth is on the left, and a white speech bubble with a black outline on the right contains the text '\$50 CREDIT' in bold yellow letters with black outlines.

Ongoing support

Reach out to me anytime

And find [resources and support](#) here.

Schedule our next call

12 weeks from today

45 minutes

We'll review your goal progress, dashboard data, any software updates, and set goals for the next 3 months.

A graphic on the left side of the image consisting of several parallel diagonal stripes. The top portion has vertical stripes, while the bottom portion has diagonal stripes sloping downwards from left to right. The stripes are yellow with black outlines.

THANK YOU!

bright
REFERRAL