Keys to a Successful Onboarding

Unlocking the Full Potential of Your Proformex Platform

Welcome to Proformex! We are thrilled to have you on board and are committed to ensuring your onboarding process is smooth and successful. Here are the key steps and best practices to help you get the most out of our life insurance software platform:

Assign a Dedicated Resource

To maximize your experience with Proformex and complete the necessary onboarding steps, assign a dedicated resource who is committed to learning and using the platform. This individual will be your go-to expert, ensuring a seamless transition and effective utilization of the system. This resource will ensure all items on the **Proformex Onboarding Checklist** are completed in a timely manner.

Utilize our Support Materials ⓘ

We have numerous support articles, video tutorials, training resources, and guides by feature available to our customers directly on our support page **here**. By utilizing these resources, your team will feel much more confident navigating Proformex!

Establish Proformex S.M.A.R.T Goals

What pain points led you to initially sign on with Proformex? What features and capabilities were the key selling points to subscribing? How will you incorporate the platform into your day-to-day business? What are you looking to achieve within 6 months of your start date?

Specific
Measurable
Attainable
Realistic
Timely

Review your Subscriber Agreement

Make sure to review the details and features that come with your subscription:

* Number of users
* Add-ons (Document Processing, Annuity Module, etc.)
* Contract Renewal Date

Explore Training Sessions

Enhance your success by attending our two training sessions designed to teach essential functionalities and best practices. Our training will equip you with the knowledge and skills to leverage Proformex to its fullest potential.

Stay in Touch!

Stay connected with your Customer Success Manger for any onboarding-related inquiries. They are dedicated to ensuring a smooth transition throughout the onboarding and implementation process. After your data has been uploaded by them, you will continue with our self-servicing module by watching our recorded training sessions and can reach out to support@proformex.com for future questions.