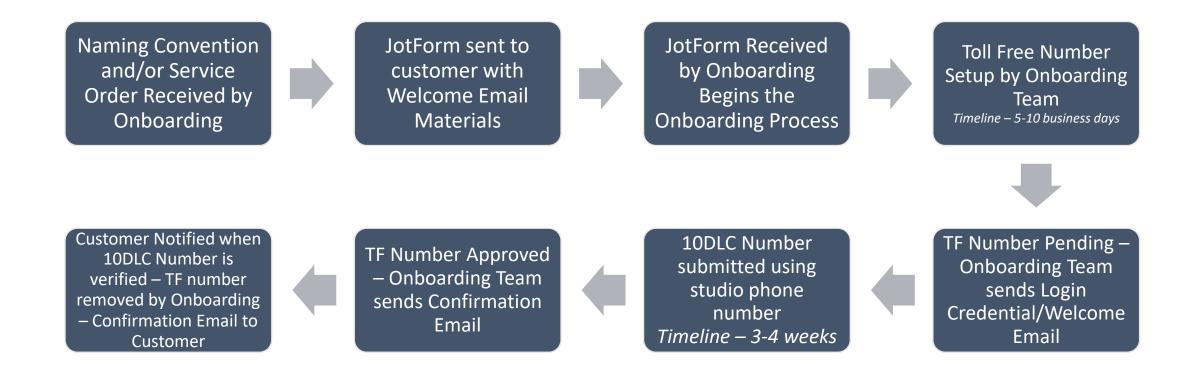
CR Connect New Onboarding

New Organic Locations (In Setup, Presale) and New Standard Connect Sales



CR Connect Managed Sales/Concierge Onboarding

Locations Sold Managed Sales/Concierge

Service Order
Signed by
Customer



Louie/Sales Team
Submits Project
to Onboarding
Team



Toll Free Number Setup by Onboarding Team Timeline: 5-10 business days



Customer Notified
when 10DLC Number is
verified – TF number
removed by Onboarding
– Confirmation to
Louie/Sales/Customer



TF Number Pending – Onboarding Team Notifies Louie/Sales Team



10DLC Number submitted using studio phone number *Timeline: 3-4 weeks*

CR Connect ZipWhip Migration

Brands moving from ZipWhip to Twilio/Connect prior to end of 2023 ONLY

Pricing Agreed to by CR SAM and Brand – Jotform Created for Franchisees



JotForm sent to customer to collect information needed for ZW Migration



JotForm Received by Onboarding Begins the Onboarding Process



Confirmation Email sent to customer notifying them of expected timeline (4-8 weeks)



Communication Sent
Two Weeks Prior to
Migration with
Login/Training
Information



Email sent to
Customer Notifying
them of Migration
Date and How/When
to Cancel ZipWhip



Twilio Team confirms
Migration Date
within 3-4 Weeks of
submission



Club Information Sent to Twilio to Verify Ownership and Determine Migration Date



Confirmation
Email/Reminder sent
1 Week Prior to
Migration



Confirmation
Email/Reminder sent
Morning of
Migration

ZipWhip Migration Email Comms and Cadence

CRConnect FAQ's

- How are we differentiating ZW customer migrations from new CRC clients? – Reporting notifying us of existing CRC Clients, ZW Customers and New Customers
- How are we communicating ZW users to cancel? Once Port Date is received – email sent to ZW users on how/when to cancel by in coordination with migration.
- Do we revert to automated emails when the system is ready? All emails will be automated and sent to customers due to volume. Support team will handle escalations

CRConnect FAQ's

- How long can we estimate after JotForm is submitted to receive an update? Confirmation email sent when Jotform is submitted. TF Customers to receive update within 5-10 days. ZW Migration Customers within 2-3 weeks.
- How often are onboarding status updates sent? Depends on customer onboarding.
- What is the ETA from JotForm submission to going live? Depends on customer onboarding. TF – 5/10 Days. 10DLC – 3/4 weeks. ZW Migration – 4/8 weeks.
- How are we handling moving current CRC customers with Bandwidth/Twilio on TF to 10DLC? Will it be automatically changed for the studio, or we communicate it with them? Jotform will need to be submitted by studio and prioritized after getting new customers onboarded.