**New OI Partner Transition & Integration Plan**

**Topic Who Date**

**#1 COMMITMENT**

Prepare package and send to new firm to sign: Claudia/Steve

⮚ Non-disclosure Agreement (JotForm)

⮚ Revised New Partner Application form (JotForm)

 Receive $1,000 payment from prospective partner Betsy

⮚ Commitments documents - Partner and OIGP (JotForm)

⮚ Trademark & Servicemark License (JotForm)

**#2 SIGNED COMMITMENTS RECEIVED**

**#3 ADMINISTRATIVE MATTERS**

Identify data & process to migrate to OIS Partner/Claudia

Inform all OI partners not involved so far Steve/Board

Prepare resolution and take an OIP Board vote Steve

Take a vote of all OIP partners (JotForm) Claudia

Notify all OIGP partners of vote Steve/Claudia

Set up oiglobalpartners.com email addresses for principals & key staff Betsy

Provide password to PRC Betsy

Update Directory and post on PRC Betsy

Dissolve previous partnerships if necessary Partner

Invoice new partner for first month’s assessment Betsy

**#4 ORIENTATION**

Design orientation plan for new partner Claudia /Steve

Provide instructions for ordering business cards and manuals Betsy

Instruct firm about how to make a referral Claudia/Betsy

Newsletter orientation and set-up for firm if they opt in Megan/Marketing Chair

Add Newsletter fee to monthly assessment if they opt in Betsy

**#5 OI SOLUTIONS**

Set up firm with default themes Claudia/Abintegro

Make accounts for all new Users (JotForm) Claudia/Partner

Migrate data from old system to OIS Claudia/Abintegro/Partner

Provide orientation / instruction Claudia/Tom Wharton

**#6 COMMUNICATING THE EVENT**

Set announcement date – internally, externally Steve/Claudia/Partner

Prepare internal announcement and press release Claudia

Partner updates their local website, removes their firm from previous sites Partner

Post new partner web page on oiglobalparters.com Partner/Claudia/Betsy

Announce new partner to all OIGP partners via email Claudia

Post PR on oiglobalpartners.com Claudia/Megan/Betsy

Distribute press release to social media & other outlets Megan

Prepare email for new partner to announce affiliation with OIP Partner/Claudia