Like most things in life, planning is everything. That is why the first several steps are *preparing* to introduce your portal to your clients and *then* introducing it. To grab the highlights, watch Presenting RightCapital to Your Clients.

- [ ] **Understand it from your client's perspective**

Understand it from the client's perspective. Get in your client's mind.

- [ ] Action: Add yourself as a client (Creating plans)
- [ ] Action: Write a proposal for yourself (Multiple scenarios and Retirement video)

- [ ] **Prepare to introduce your portal**

Email or in-person? How much do I share? Which talking points do I use? We all want to lead with the best foot forward—use these tips to ensure you are ready with your clients.

- [ ] Training: Know your portal's value proposition (Best practices and talking points)
- [ ] Training: Decide how to introduce your portal (Introducing RightCapital)
- [ ] Action: Determine what's enabled in your client's portal (Granting access)

- [ ] **Brand your portal (Brand RightCapital your way)**

- [ ] **Invite clients to their portal**

This is the big reveal! By now, you understand it from the client's perspective, you know the benefits, and you've dialed into the experience. You are ready to expand the portal beyond just a few clients.

- [ ] Action: Pre-fill your client's basic information
- [ ] Action: Ensure your client has the right access (Granting access)
- [ ] Action: Send introduction email or client meeting (Sample email messaging)
- [ ] Action: Invite clients to their account (Inviting your client)
- [ ] Action: Share resources to guide them step-by-step (client-facing resources)
- [ ] Action: Invite clients to use your mobile app (video and article)

- [ ] **Track clients' progress with metrics (article)**

All set? Now deliver an exceptional experience.

Got questions? Contact us at support@rightcapital.com or chat with us!