

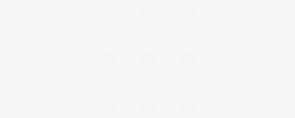


# Getting Started With Athennian: A Comprehensive Guide



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# 1. Welcome!

Congratulations on choosing Athennian! You've taken the first step towards implementing best-in-class entity management software that will provide a central source of truth to help you create organization-wide visibility, empower decision-making, centralize business data, and ensure compliance.

In this guide, we'll cover the key basics you and your team should know before you begin the onboarding process.

First, we'll introduce you to the Athennian teams who will support you throughout migration.

Next, we'll give you an overview of the various levels of migration support Athennian offers, and a guide to the Athennian training process.

Finally, we'll provide you with an onboarding roadmap, migration checklists, and tips and tricks from the experts on the Athennian team.



## 2. Your Athennian Team

Athennian has several teams dedicated to helping create the optimum time-to-value for new customers. As you build your central source of truth with Athennian, the four support teams outlined below will be your partners during migration and beyond.

"What we started to really appreciate about Athennian during implementation was the customer support. They have a generally superior customer support offering."



Allan Oziel  
Founder and Managing Partner,  
Oziel Law

## I. Delivery Success Team

This team is the first contact point for new Athennian customers. The Athennian onboarding team is a group of dedicated specialists focused on helping new customers migrate their existing data into Athennian. A dedicated Delivery Success Manager (DSM) will be your main point of contact throughout the Athennian onboarding process and your partner throughout migration. Your DSM will help with any project or migration-related questions during the first stage of your Athennian journey.



## II. Product Support Team

This group provides quick access to chat and email support for both new customers and seasoned users. Contact them anytime with immediate technical questions or requests for guidance on key issues, such as using specific Athennian features. This team can answer product-specific or technical questions you encounter while using Athennian.



## III. Training Team

This team provides Athennian training customized to individual customer needs. After the key Athennian users from your organization have completed their online training (organized into ten introductory lessons), your Training Coordinator will help design custom training specific to your workflows. Each new Athennian customer receives a catered training experience that includes one to five custom training sessions tailored to your specific requirements.

## IV. Customer Success Team

Once new customers have completed their Athennian migration process and are fully up and running, they will transition to their dedicated Customer Success Manager (CSM). This partner will replace the Delivery Success Manager who guided your team through the migration process. Your Customer Success Manager will be your main Athennian point of contact from now on.

## V. Key Athennian Contacts

Key Athennian Contacts			
Team	Role	When to Connect	Why to Connect
Delivery Success Team	Delivery Success Manager	During your Athennian onboarding and data migration process.	Reach out with any migration or onboarding-related questions or concerns.
Product Support Team	Product Support Specialist	Anytime in your Athennian journey, both during migration and after data migration is complete and you are a fully-integrated user.	Ask this team any product-specific or technical questions you may have.
Customer Success Team	Customer Success Manager	After your Athennian onboarding and data migration process is complete and you are fully up and running.	Ask this team any product-specific or technical questions you may have.

# 3. Athennian Migration Support

While each organization's Athennian onboarding process is unique, Athennian offers three general levels of onboarding support:

## I. Self-Onboarding

For DIY-ers who prefer to manage their own data and migration process with some support, Athennian offers a self-onboarding package. Athennian will support self-onboarding by creating a personalized environment setup within Athennian and providing one comprehensive tailored training session.

## II. Standard Onboarding

For new customers who want more support, Athennian offers a standard level of onboarding assistance. Athennian will provide a seamless environment setup tailored to your needs and a dedicated DSM for a month, who will provide you with weekly status updates. Athennian will also provide limited data migration at this level, including bulk uploading of documents. Athennian will create three live, in-depth training sessions tailored to your team's unique needs.

## III. Premium Onboarding

This level includes white-glove service. An Athennian expert will craft an environment and structure within Athennian tailored to your unique needs, and your team will be paired with a DSM for three months. This package includes assistance with migrating data and documents from

"Athennian's support was great. We had a great experience with our onboarding and implementation process"



Jocelyn Rush  
Corporate & Tax Paralegal,  
Moody's Tax Law

spreadsheets and PDFs. The Athennian Training Team will also design five custom live training sessions for your team, tailored to your organization's unique needs.

Athennian can also provide quotes for custom database migration support needs. In addition, the company now offers worldwide Registered Agent services with a global partner.



# 4. Athennian Training

Training for you and your team is a key step in migrating to Athennian. Athennian provides an efficient, tailored training program to help you get up and running quickly.

The process starts with the Athennian missions: ten training videos ranging from three to seven minutes each that together provide a complete overview of Athennian's functionality. Next, you will work with your Delivery Success Manager to curate live, instructor-led training sessions for you and your team. Finally, the Athennian Help Center will serve as an ongoing resource library once you and your team have completed the Athennian onboarding and training process.

## I. Top Athennian Workflows

The most efficient way to get up and running quickly in Athennian is to complete these [ten short instructional videos](#). Completing all ten takes just over 45 minutes. Each video gives you and your team a concise, easy-to-follow guide to a core aspect of Athennian's functionality.

Want more comprehensive information about something covered in a video? The how-to articles [here](#) are deep dives into many of the topics covered in the first ten missions.

## II. Customized Instructor-Led Training

Once the key users on your team have completed the ten missions, Athennian will create between one and five customized instructor-led trainings tailored to your company's specific needs and workflows. Your Training Coordinator will work with you and your Delivery Success Manager to design the ideal training process for your team, tailored to your team's unique needs.

Athennian has great support people. They're very responsive and do not let up until it's done. Our transition was quite challenging, but I had great people to work with at Athennian to help us through."



*Jeannie Huffer*  
Administrative Clerk,  
Dentons Bingham Greenebaum LLP

## III. The Athennian Help Center

Once you and your team complete the missions and the live training process, you will have permanent access to the [Athennian Help Center](#), a library containing over 250 resources. It includes articles, videos, new feature information, and guides on using tools for specific workflows. The Athennian Help Center is constantly growing, with new content added weekly. This valuable resource is your one-stop shop for continuous learning, ongoing training, and onboarding new team members into Athennian.

# 5. Migrating to Athennian

## I. Everything Begins with the Data

The most important step toward becoming a new Athennian customer is preparing your data for migration.

Organizing and preparing your data in advance will make your onboarding process and the migration to Athennian rapid and smooth. Depending on your data and how fragmented your files are, you may want to start preparing several weeks to months before your planned Athennian transition. A project plan and a timeline with key milestones are both helpful during this process stage.

*"The scavenger hunt for the documents before the Athennian migration starts is often the hardest part for our new customers. It's night and day though because as soon as their documents are in Athennian, it's so easy for them to find everything." - Athennian Manager for Delivery Success*

Once your data is migrated into Athennian, you will never need to go on a document scavenger hunt again. Athennian will become your organization's central source of truth.

## II. The Athennian Migration Roadmap



## III. The Athennian Transition

As you look ahead to your Athennian migration, below is a high-level guide to the key components of onboarding: who, what, and when.

- **WHO** from my organization should be involved in this project? Depending on your organization, the project team may be just a couple of individuals or a larger team.
  - Potential roles to include on your internal Athennian migration team include paralegals, IT staff, or anyone else from your organization who will be a power user.
  - Designating a project manager during the transition is helpful.
  - Everyone who will be a read/write user should be involved at some stage of the migration, whether in the active data migration phase, the training phase, or both.
  - If your IT group isn't part of the project team, make sure you alert them and provide access to the platform.



- **WHAT** should my team do to prepare to migrate to Athennian? Preparing for migration requires some time and forethought from you and your team.
  - Prepare your data so that it is ready to be shared with the Athennian team. This might include confirming entities, tracking down associated documentation, formatting a database or scanning hardcopy documents.
  - Send a sample of your data to your Athennian DSM, so our data experts can view, validate, and understand your needs.
  - Create a sample summary of how your team uses this data in their day-to-day operations so your Athennian team can help ensure those processes run smoothly after the transition.
  
- **WHEN** should we hit key milestones, and what timeline should we expect? The Athennian team's goal is to fully migrate every new customer within 30 to 90 days. The timeline will depend on several key factors:
  - How much data preparation your team has accomplished before the migration project starts (please see the data checklists below for more details).
  - How complicated your data is and how many entities you have.
  - Your team's availability constraints, such as holidays, vacation schedules, blackout periods, etc.

Your Delivery Success Manager will book weekly or biweekly calls during the migration process to ensure full support throughout onboarding.

## IV. Common Missteps

Athennian's onboarding experts share the most common missteps that new customers make during onboarding.

**"We can only move as fast as the customer moves with their data readiness. As soon as they organize their data into a logical order and provide it to us, we can help them through the rest of the process."**  
 - Athennian Manager for Delivery Success

The customer support from Athennian has been so helpful at each step of the way. They were very much involved in our migration and held weekly training with a dedicated trainer who was super helpful."



Deanna Venello  
 Legal Operations Manager,  
 Commvault

**"Athennian can demonstrate best practices, but it is up to the customer to create their own internal workflows to best structure the system for their needs."**  
 - Delivery Success Manager

**"Athennian migrates data submitted on a particular date. We can't perform rolling migrations of data for either database or manual migrations. Please make sure everything you want in Athennian is collected and submitted by the agreed-upon time!"**  
 - Delivery Success Manager

**"A common misstep we see new customers make is that the individual with the signing authority doesn't coordinate with the people who are the boots on the ground. Because of that, there's sometimes a misalignment of expectations once the end users jump into the system."** - Athennian Manager for Delivery Success



# 6. Tips & Checklists for Data Migration

## I. What Type of Data do I have?

There are essentially two types of data – structured and unstructured. Your Athennian migration roadmap and process will depend on which type of data your organization has.

- **Structured Data:** If your organization uses any form of database, you have structured data. Organizations with structured data may have ancillary documents that also need to be located and uploaded, but all entities are already listed in a database format.
- **Unstructured Data:** If your data is in non-database form (such as PDFs, hardcopy documents, Word or Excel), you have unstructured data. It may be in an electronic format that requires aggregation or formatting, or in hardcopy format that needs scanning.

For either data type, Athennian will create a Secure File Transfer Protocol (SFTP) for data transfer if you require it.

"I have only good things to say about the support we received from Athennian. Our DSM really kept us on track in getting everything in the system. She gave us a very clear project plan and walked us through it step by step."



Edmée Moojen  
Foundations Support Specialist,  
Benevity

## II. The Athennian Migration Checklist

Below is a comprehensive checklist to ensure that you and your team are fully prepared for onboarding and have completed all necessary data preparation steps to create your optimal Time-to-Value with Athennian.

- **The Structured Data Checklist:**
  - Create a backup of your database.
  - Conduct a test run to check field and data compatibility for direct upload into Athennian.
  - Locate any additional documents associated with your database entries, scan or upload them, then share with Athennian.
  - Create a final backup of your database.
  - Work with your Athennian DSM to complete the migration into Athennian.\*
- **The Unstructured Data Checklist:**
  - Aggregate your data. If on paper, bring it into digital form.
  - Consolidate your data into a single spreadsheet, and decide which data you want to prioritize for upload. If needed, work with your Athennian DSM to create a phased approach to gathering your entities.\*
  - Create a list of entity names and their jurisdictions and share it with your Athennian DSM.
  - Organize your other documents into folders by entity names, and share with Athennian.

- Your DSM will coordinate with Athennian's data experts to upload your data using your formats and field structures\*

\*For companies that opt not to leverage Athennian's migration assistance and choose to self-migrate, these steps will be performed by the customer's internal team.

### III. Tips and Tricks for Success

Athennian's migration experts share their best tips to help you succeed in your onboarding process.

- **The most successful customers come to us with their data prepared. They've spent a few hours finding and organizing their data before beginning their Athennian migration project.**  
- Manager for Delivery Success
- **"Things can always be edited or modified after the fact! Customers don't need to get hung up on the data being "perfect" before using Athennian."**  
- Delivery Success Manager
- **"The customer does not need to format their data in a specific manner when submitting to us! As long as you can identify where your data can be found, we will perform the mapping process for you and provide that information back to you for confirmation."**  
- Delivery Success Manager
- **"We migrate customer data as is without assumptions. We generally do not clean up the data during migration, though we can advise if something looks incorrect."**  
- Delivery Success Manager

"Athennian's support was great. They input all data into Athennian, then created our virtual minute books. It was so helpful."



Erica DeRosa  
Law Clerk,  
Aecon Group Inc.

- **"Customers who document their existing workflows or have a solid understanding of them really help us both provide the best advice and tailor the training. While discovery questions on our end can help get them thinking and uncover some good nuggets, there also needs to be an awareness from their end."**  
- Customer Success Manager

## 7. Ready for Launch!

Now that you and your team have reviewed the tools and tips outlined in this guide, you're prepared to move forward with your Athennian migration and onboarding process. As you embark on the journey towards a single source of truth for your organization, Athennian is here to support you at every step of the way. If you have questions or want to learn more, please contact:



# About Athennian

Athennian is a modern business entity and subsidiary governance platform that powers teams to be transaction, audit, and compliance-ready. Legal, finance, and tax professionals use Athennian to automate workflows for ownership, governance, tax, and corporate compliance.

