**Client Check List**

This customizable checklist is designed to empower your team as you prepare for a transition to the new Security Groups model. We understand that successful change involves careful planning, clear communication, and the right people at the table.

This document provides a comprehensive framework, outlining key actions, identifying essential stakeholders, and suggesting critical communication steps to guide you in preparing your entire organization for the upcoming changes.

How to Use This Checklist:

* **Personalize It**: This is a template! Download it, add your specific team names, project timelines, unique communication channels, and any additional steps relevant to your organization's unique structure and needs.
* **Assign Ownership**: Clearly assign owners for each action item to ensure accountability and progress.
* **Track Your Progress**: Use this document to track your readiness, identify potential roadblocks, and ensure all bases are covered.
* **Communicate Effectively**: Leverage the suggested communication steps to proactively inform and engage your users, minimizing disruption and maximizing adoption.

Our goal is to make this migration as smooth as possible for you and your team. This checklist is your starting point for successful preparation and rollout!

| **Step** | **Action**  | **Owner(s)** | **Why it Matters** | **Target Date** | **Completion Status** |
| --- | --- | --- | --- | --- | --- |
| Emphasize the “Why”  | Communicate the benefits of security groups.  |  | Helps your team understand the value and importance of the change.  |  | Not Started |
| Educate | Ensure your team understands what security groups are and how they differ from individual permissions.  |  | Builds confidence and reduces confusion during roll out.  |  | Not Started |
| Provide Resources  | Share supporting materials like documentation, FAQs, and video tutorials.  |  | Enables self-service learning and reinforces training.  |  | Not Started |
| Timeline  | Set and communicate the timeline for your internal roll out. |  | Keeps the migration on track and ensures team readiness.  |  | Not Started |
| Gather Feedback | Collect input from your team and share it with your ClearCompany contact.  |  | Ensures your unique needs are considered and potential issues are addressed early.  |  | Not Started |
| Make it Easy | Use the worksheet provided to simplify planning and organize roles and permissions.  |  | Reduces time and effort needed to prepare for the transition.  |  | Not Started |
| Update Internal Resources  | Refresh internal docs, hiring guides, and training materials to reflect the new structure.  |  | Promotes consistent use and supports long-term adoption of the new model.  |  | Not Started |