

Complete conversion of your data in just 14 days. An implementation coordinator will be in touch with you shortly after you subscribe to IDEXX Neo to assist with your transition and ensure your success from conversion to go-live.

Day 1 Day 2 Day 3 Day 4 Day 5 Day 6 Day 7 Day 8 Day 9 Day 10 Day 11 Day 12 Day 13 Day 14



### Days 1–2 Prepare for Your Data Conversion

**Responsibility:** Business Owner, Practice Manager

An implementation coordinator will be in contact to assist you.



### Days 1–5 Prepare Your Staff: Communication is The Key to Your Success!

**Responsibility:** Business Owner, Practice Manager

**Key Actions:**

- Explain purchase reasoning for new software to staff.
- An Conversion Coordinator will contact and assist you after purchase.



### Days 4–5 Initial Conversation

**Responsibility:** Business Owner, Practice Manager

**Key Actions:**

- After conversion, a conversion expert will review and validate with you.
- Log into your Neo software. Set up and prepare for final conversion.

Day 1 Day 2 Day 3 Day 4 Day 5 Day 6 Day 7 Day 8 Day 9 Day 10 Day 11 Day 12 Day 13 Day 14



### Days 4–6 Complete Your Self-Paced Training

**Responsibility:** Business Owner, Practice Manager

**Key Actions:**

- Access built in training when logged in or click "Help".
- Make usage decisions after completing training.
- Create an implementation plan with your staff.
- Schedule role-based duties and training for you staff.



### Days 6–8 Have Your Staff Complete Their Training

**Responsibility:** All Staff

**Key Actions:**

- Assign role-based training.
- Complete training before Go Live date.



### Days 6–10 Complete Remaining Setup

**Responsibility:** Business Owner, Practice Manager & all designated users

**Key Actions:**

- Common features to complete at this stage: Set up forms and certificates, clean up reminders, review products, review procedure templates.

Day 1 Day 2 Day 3 Day 4 Day 5 Day 6 Day 7 Day 8 Day 9 Day 10 Day 11 Day 12 Day 13 Day 14



### Days 10–13 Final Conversion

**Responsibility:** Business Owner, Practice Manager

**Key Actions:**

- Final conversion to ensure accuracy and updates.
- Your CST will be in contact for final steps.

### Day 14 Go Live!

Your conversion is complete and your practice is up and running—now it's time to go live with Neo!

