**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.

**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.

**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!

Learn more at IDEXXNeo.com/setup