Assembly | PROFESSIONAL SERVICES

Pathway Comparison Matrix

3 Pathways · Included Deliverables · Add-On Services · Pricing · Contractual Provisions

PATHWAY A

Standard Self-Start

PATHWAY B

Standard – Data Conversion

PATHWAY C

Full-Service – Data Conversion

About Pathways

Every Neos implementation follows one of three defined Pathways. Each Pathway is matched to a firm's size and data-conversion needs, while every Pathway moves through the same seven-stage implementation journey — from Kickoff through Handoff to Customer Success — with clearly defined roles on both sides.

> “Three Pathways. One proven seven-stage journey. Every firm gets a dedicated Assembly team, transparent effort expectations, and a defined path to go-live.”

CHOOSING A PATHWAY

Pathway A (Standard Self-Start) and **Pathway B (Standard Data Conversion)** suit most 3-70 user firms.

Pathway C (Full-Service Conversion) is built for larger or more complex firms needing custom configuration and Assembly-led UAT.

See the following Pathway Overview pages for details on each.

TYPICAL QUESTIONS

Which Pathway is right for our firm size?

How much effort will this take from our team?

Will our data convert, or do we manage that ourselves?

What support do we get after go-live?

OUR RESPONSE

Every Pathway maps directly to your firm size and data-conversion needs

Roles & responsibilities are defined for Assembly and your firm before kickoff with average effort commitments based on Pathway

A named PM and Systems Engineer lead you through all seven stages

Kickoff is scheduled within 10 business days of Order Effective Date, with milestone updates throughout

OUR COMMITMENT

A defined Post Go-Live Stabilization period (7–30 days based on Pathway) before handoff to Customer Success

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A named PM and Systems Engineer with you from Kickoff through Handoff

Pathway A Overview

Standard · Self-Start

CUSTOMER PROFILE:

For firms of 3-30 users who want to launch Neos quickly and manage rollout themselves, using Assembly-standard configuration, reporting, and training out of the box.

PATHWAY OUTCOMES

The Pathway includes:

- New Neos environment provisioned and connected to MS365 / SharePoint
- Support user access configured for the Assembly PS team
- Standard reports & templates ready to use out of the box
- Admin training (1 session) and end-user training (2 sessions) delivered live virtually
- Go-Live and post-go-live virtual Q&A / open mic sessions completed
- Handed off to Support & Customer Success at go-live

CUSTOMER EFFORT

Self-directed. Your team owns setup and configuration using the included training (1 admin + 2 end-user sessions) and standard templates — best suited to firms ready to self-manage rollout.

KICKOFF WINDOW

10 business days from Order Effective Date to kickoff, the same as every Pathway.

AVERAGE TIME TO LIVE

Firms that dedicate the time are live in an average of 10 business days from kick-off.

POST GO-LIVE STABILIZATION

7 days of Assembly implementation-team support after go-live — the shortest of the three Pathways.

PATHWAY EXPERIENCE

The lightest-touch Pathway: setup is confirmed at kickoff, then straight to UAT & Training. With the Excel upload add-on, your firm validates that data before training.

Pathway B Overview

Standard · Data Conversion

CUSTOMER PROFILE:

For firms of roughly 3–70 users migrating existing data into Neos, who want Assembly to handle data conversion and staff profile setup with full Onboarder-led training before go-live.

PATHWAY OUTCOMES

The Pathway includes:

- Existing data mapped, converted, and migrated into Neos (standard fields plus up to 10 UDFs)
- Staff profiles configured and support user access set up
- Admin, end-user, advanced search & document coding training delivered live
- Data validated by your firm in a 14-day data review window
- Post-conversion data clean-up and production cutover completed
- Go-Live and post-go-live Q&A sessions plus handoff to Customer Success

CUSTOMER EFFORT

Moderate. This is an On-boarder-led Pathway — your team provides source data, attends data-mapping and discovery calls, and completes training.

KICKOFF WINDOW

10 business days from Order Effective Date to kickoff.

AVERAGE TIME TO LIVE

Firms that dedicate the time are live in an average of 20 business days from kick-off.

POST GO-LIVE STABILIZATION

14 days of Assembly implementation-team support after go-live.

PATHWAY EXPERIENCE

A full Kickoff → Discovery & Design → Data Conversion & Validation → Stabilization journey, with a named Onboarder guiding data conversion and go-live. ETAM is available for MM2/Enterprise firms.

Pathway C Overview

Full-Service · Conversion

CUSTOMER PROFILE:

For the largest (up to 100 users), or more complex smaller, firms that need full-service data conversion across all Neos fields, custom case type & intake design, and formal user acceptance testing before go-live.

PATHWAY OUTCOMES

The Pathway includes:

- Full data conversion across all Neos fields plus up to 10 UDFs, with a 14-day data review window
- Case type, checklist, and intake layout configured for your practice
- Comp/guest program, staff profiles, and advanced reporting set up
- Full training curriculum delivered, including advanced search & document coding
- UAT (user acceptance testing) completed and signed off before go-live
- Eligible for ETAM (Enterprise Technical Account Management) for ongoing support

CUSTOMER EFFORT

Highest. Your team participates in Assembly-led UAT, reviews custom configuration, and signs off on data mapping.

KICKOFF WINDOW

10 business days from Order Effective Date to kickoff.

AVERAGE TIME TO LIVE

Firms that dedicate the time are live in an average of 40 business days from kick-off.

POST GO-LIVE STABILIZATION

30 days of Assembly implementation-team support after go-live — the longest of the three Pathways.

PATHWAY EXPERIENCE

The most comprehensive, Onboarder-led Pathway: full conversion, custom configuration, and a formal UAT gate before go-live.

Roles & Responsibilities

A successful implementation is a shared effort. The table below defines what each Assembly role owns and what your firm needs to commit — and which project phases each customer role is most active in.

ASSEMBLY PROFESSIONAL SERVICES TEAM

PM — Project Manager

Leads the engagement end-to-end. Plans, executes, communicates, and closes the project. Manages expectations, resolves conflicts, and owns the CSAT handoff to CSM.

SE — Systems Engineer

Owns all technical delivery: data conversion, Pre-Production Environment (PPE) provisioning, graph mapping, integrations, cutover runbook, and production deployment.

Trainer — Trainer

Delivers admin training, end user training, and UAT sessions. Runs the go-live Q&A / open mic call. Ensures every firm completes UAT and signs off before go-live (Assembly-led for 11+ users).

Coord — Implementation Coordinator

Initiates first customer comms, schedules kickoff and go-live meetings, manages the Neos Resource calendar, and maintains CRM accuracy throughout.

DCE — Data Conversion Engineering

Handles all non-customer-facing conversion code development. Liaisons between dev team and PS. Responsible for all conversion tooling and code quality.

YOUR FIRM — REQUIRED CUSTOMER COMMITMENTS

Project Manager(s) — Project Manager(s)

Tracks firm-side deliverables and attends all PS calls. Responsible for all customer side change management activities. Coordinates homework, responds to Assembly within 24 hrs.

Most active: All phases

Neos Admin — Neos Administrator

Main POC with Assembly. Attends all implementation meetings. Configures Neos, owns all post-deployment admin decisions.

Most active: All phases

IT Admin — IT Admin

Authenticates, with Global Administrator (GA) credentials, to provide programmatic access for the implementation project at kickoff. Confirms M365 licensing. Manages SharePoint capacity before doc migration.

Most active: Kickoff · Conversion

Super Users — Super Users

Completes all training sessions. Participates in UAT. Reports data issues during the 14-day data review window.

Most active: Training · UAT · Go-Live

Your Seven-Stage Implementation Journey

Every Pathway flows through defined project states. Each state has a defined owner, tasks, and definition of done before advancing. The final two stages (Go-Live and Onboarding) are shown separately to reflect the distinct customer experience milestone of being introduced to their ongoing success team.

1 Kickoff — PM

- Coordinator schedules kickoff & sends welcome pack
- PM introduces team, presents scope, timeline & firm responsibilities
- M365 licenses, primary domain & GA credentials verified
- Kickoff summary email sent with deck and next steps

All Pathways

Gate to Discovery & Design: Tasks complete · Customer confirmed ready to proceed

2 Discovery & Design — SE

- SE collects all relevant technical info and analyzes results
- Data mapping, workflow, and document discovery calls with firm
- Findings documented and customer homework assigned
- Not applicable for Self-Start — setup confirmed at kickoff

Pathways B & C

Gate to Data Conversion & Validation: Tasks complete · complete · Homework verified · Custom objects scoped scoped

3 Data Conversion & Validation — SE

- Data mapping finalized and reviewed
- Data converted & documents migrated into PPE; SE links documents and runs sanity test
- M365 integrations set up with firm's GA
- Customer validates converted data in PPE

Pathways B & C

Gate to UAT & Training: Data validation signed off · off · Docs mapped · Templates set · M365 set

4 UAT & Training — Trainer

- PM schedules training sessions and any purchased training tasks
- Admin & end-user training delivered
- Firm runs UAT, incl. documents, with Assembly script (Assembly-led for 11+ users)
- Firm returns signed UAT acknowledgment (all firms)

All Pathways

Gate to Go-Live: Training complete · UAT signoff (all firms) (all firms)

5 Go-Live — PM/SE

- SE builds cutover runbook for production deployment
- SE executes cutoff call, deploys production, passes final sanity
- Project marked Deployed in Assembly CRM
- Go-live email sent with Company ID and support contact info
- Trainer runs day-of open mic call

All Pathways

Go-Live: Email sent with Company ID · Open mic day-of day-of

6 Stabilization — PM

- Pathway A: 7 days · Pathway B: 14 days · Pathway C: 30 days
- Trainer runs open mic call day-of and follow-up within 7 days
- PM checks in per contract agreed cadence; manages Post-Go Live Incidents (PGLI)
- PGLI updates every 2 days until resolution
- ⚠ PGLIs reported after 60 days post go-live subject to standard PS rates

All Pathways

Gate to Onboarding: Open mic complete · Cadence check-ins check-ins done · Stabilization closed · Critical PGLIs resolved resolved

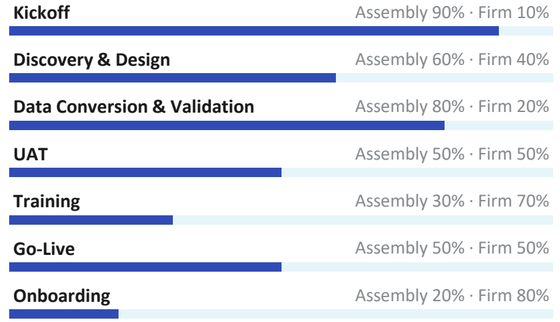
7 Onboarding — PM/CSM

- PM sends CSAT survey (not a gate)
- CSM formally introduced; CSM becomes primary contact

All Pathways

Closed: CSM introduced & handed off

EFFORT SPLIT BY PHASE



Indigo = Assembly share · remainder = your firm

Environment Setup

● Included — Not applicable

DELIVERABLE	Pathway A Standard · Self-Start	Pathway B Standard · Data Conversion	Pathway C Full-Service · Conversion
ENVIRONMENT SETUP			
New Neos environment provisioning	●	●	●
MS365 / SharePoint integration (set up before training for all Pathways)	●	●	●
SharePoint site configuration required for Neos setup	●	●	●
Staff profile set up	—	●	●
Support user access for Assembly PS team	●	●	●
Standard reports & templates	●	●	●
Case type setup (incl. checklist)	—	—	—
Intake layout design (1 case type)	—	—	—
Advanced search reports	—	—	**2**
Merge template – Standard (up to 15 tags/fields)	—	—	**3**

Data Conversion

● Included — Not applicable

DELIVERABLE	Pathway A Standard · Self-Start	Pathway B Standard · Data Conversion	Pathway C Full-Service · Conversion
DATA CONVERSION			
Data mapping appendix: source system to standard Neos fields only — one 7-day review period	—	●	—
Data mapping appendix: source system to all Neos fields — one 14-day review period	—	—	●
Standard Neos fields converted	—	●	●
All other fields converted	—	—	●
User-defined fields (UDFs) converted – 10 UDFs	—	●	—
14-day data review window (data validation of converted data in PPE; PPE copy does not carry to Production; some config may carry over)	—	●	●
Post-conversion data management / clean-up	—	●	●
Production data cutover	—	●	●

Training, UAT & Project Management

● Included — Not applicable

DELIVERABLE	Pathway A Standard · Self-Start	Pathway B Standard · Data Conversion	Pathway C Full-Service · Conversion
UAT & Training			
Administrator training (live virtual classroom) — 2 hrs/session, no more than 3 admins per session	1	1	1
End user training (live virtual classroom) — 3 hrs, split into two 1.5 hr sessions (part A and part B), for up to 20 users	1	1	1
Advanced search (live virtual classroom) — 1 hr/session, up to 5 attendees	—	1	1
Document coding (live virtual classroom) — 1 hr/session, up to 5 attendees	—	1	1
Go-Live virtual Q&A / open mic session	1	1	1
Post go-live virtual Q&A / open mic session	1	1	2
UAT — script & sign-off for all; Assembly-led for Pathway C	Script + sign-off	Script + sign-off	Assembly-led
PROJECT MANAGEMENT — INCLUDED IN ALL PATHWAYS			
Kickoff call & welcome pack	●	●	●
Roles, responsibilities & timeline confirmed	●	●	●
Regular milestone updates throughout project	—	●	●
Handover to Support & Customer Success	●	●	●

Note on included training: firms have 45 days from go-live to schedule. Additional sessions and 1:1/in-person options are available for purchase

Capability Bundles and Key Add Ons

● Included — Not applicable

BUNDLE / ADD-ON	Pathway A Standard · Self-Start	Pathway B Standard · Data Conversion	Pathway C Full-Service · Conversion
CAPABILITY BUNDLES			
Intake Pro: 1 Intake configuration (layout, checklist, automation); Intake Pro dynamic questions setup; 2 hrs. intake admin/user training	—	Choose 1 of 5	Choose 2 of 5
Case Type: 1 Case type configuration (layout customization + checklist); 2-hrs case-config admin training	—	Choose 1 of 5	Choose 2 of 5
Training: 8-hours, usable for admin and/or user training sessions	—	Choose 1 of 5	Choose 2 of 5
Reports: 2 custom reports; 2 Advanced Search reports	—	Choose 1 of 5	Choose 2 of 5
Starter Pack: 3 templates, 2 Advanced Search reports, 1 Dashboard, 1 custom report	—	Choose 1 of 5	Choose 2 of 5
Key Add-Ons			
Document migration	—	For Fee Add On	For Fee Add On
Additional document source migrated to SharePoint	—	For Fee Add On	For Fee Add On
Folder hierarchy restructured	—	For Fee Add On	For Fee Add On
Populated Excel template review & upload	For Fee Add On	—	—
UDF migration add-on (10 UDFs) – Max 2	—	For Fee Add On	—
Settlement memo - new from scratch	For Fee Add On	For Fee Add On	For Fee Add On

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Contractual Provisions

● Included — Not applicable

PROVISION	Pathway A Standard · Self-Start	Pathway B Standard · Data Conversion	Pathway C Full-Service · Conversion
CONTRACTUAL PROVISIONS			
Admin Hold Fee — $250/day after 30-day customer delay; max 60 days ($15,000 cap)	●	●	●
Data review window · Acceptance	UAT sign-off	14 days · UAT sign-off	14 days · UAT sign-off
Offer Expiration Clause— Assembly reserves right to revise pricing/terms	Per order form	Per order form	Per order form
Applicable Terms and Conditions	GTC	GTC	GTC
Post Go-Live Stabilization (Implementation Team) period	7 days	14 days	30 days
Kickoff window	10 business days	10 business days	10 business days
Post Go-Live Issues (>60 days)	Std PS rates	Std PS rates	Std PS rates

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