THE Joy OF MEMBERSHIP

JourneyCARE
Guide to Your Migration

journeycare.app

Welcome to JourneyCARE!

We’re excited to work with you!

Beginning a migration can bring a mix of excitement, anticipation, and a few understandable nerves. There are many moving pieces, but you will not be navigating them alone. This guide explains what to expect, how the process will unfold, and what your team can do to help keep the project moving smoothly. At the end of the journey, your organization will have more than a new website or database. You will have a connected environment for managing relationships, communications, transactions, events, learning, member access, and the everyday processes that support your mission.

Supportive by design. Structured for success.

We want this process to feel collaborative, approachable, and manageable. At the same time, a successful migration depends on clear expectations, timely decisions, and shared accountability. Our team will guide the process and complete the work included in your agreement. Your team will provide the necessary information, review work, participate in training, validate the finished processes, and approve the final data and launch according to the agreed schedule. Meeting these commitments keeps the interconnected pieces of the project moving and protects the time needed for testing and a smooth launch.

The journey at a glance

STAGE	WHAT HAPPENS
1. The Preparation	Gather essentials, identify decision-makers, and protect time for the project.
2. The Kickoff	Confirm scope, timing, responsibilities, and how project communication will work.
3. The Build	Four areas of work move forward concurrently *Track 1: Website + Portal* *Track 2: Core Processes* *Track 3: Data & Directory* *Track 4: Launch Readiness*
4. The Launch	Publish the website, invite users, monitor activity, and manage the transition.

STAGE 1: THE PREPARATION

A little preparation now prevents delays later.

Before implementation begins, take a clear-eyed look at your current website, processes, data, and calendar. You do not need every answer yet. You do need the right people engaged and enough protected time to make decisions.

Project readiness checklist

- ☐ JourneyCARE agreement is signed and the initial invoice is paid.
- ☐ Kickoff meeting is scheduled with key project participants.
- ☐ A primary project lead has been named.
- ☐ A small decision-making group has been identified.
- ☐ Any hard deadlines are identified, especially your current software renewal or termination date.
- ☐ Any schedule conflicts are identified: competing priorities, required renewal cycles, communication deadlines, team member vacations, etc.

Start gathering these materials

- ☐ High-resolution logo files, preferably SVG, EPS, or transparent PNG.
- ☐ Brand guidelines, required colors, fonts, and usage rules.
- ☐ Examples of websites you like and what you like about them.
- ☐ A list of what works and does not work on your current site.
- ☐ A typical member email showing greeting, tone, signature, and sender details.
- ☐ An example of the type of continuing education certificate you send, if applicable.
- ☐ Current process notes, forms, email sequences, price lists, and membership rules.
- ☐ Names of staff or volunteers who understand joining, renewals, events, CE, donations, and sponsorships.
- ☐ Identify where your domain is controlled (e.g. GoDaddy, Network Solutions, CheapDomains, etc.)
- ☐ Know how credit cards are currently being processed so we can assess if the processor is compatible with JourneyCARE

Questions to discuss internally

- ☐ What information, pages, or processes no longer serve a clear purpose?
- ☐ Where do staff members rely on memory, spreadsheets, or workarounds?
- ☐ Which decisions require board or committee approval, and when can those decisions be made?
- ☐ What would make this migration feel genuinely successful six months after launch?

STAGE 2: THE KICKOFF

We align the project before anyone begins building.

Your kickoff is a Zoom working session focused on scope, schedule, roles, and the way we will collaborate. We will review what the JourneyCARE team is building and what your trained administrators will complete.

During kickoff, we will confirm

- [ ] Target timing and any immovable dates.
- [ ] The contracted scope for the build - number of website pages, forms, products, etc. that our team is building for you vs. what your team will add after your training
- [ ] Who provides input and who gives final approval.
- [ ] How to use the project management workspace for questions, files, decisions, and feedback.
- [ ] The first materials and access our team needs.
- [ ] Timing for the four core process build sessions.

Immediately after kickoff

- [ ] Provide access to current website areas that are not publicly visible.
- [ ] Send an initial data export or sample.
- [ ] Identify which fields belong in the public or member-only directory.
- [ ] Provide a representative email and certificate examples.
- [ ] Confirm who will attend each process build session.
- [ ] Begin using the project workspace as the central source of truth.

Keep project decisions and details in one place

Email is easy to lose and difficult for a project team to track. We use a project management tool called Outlign to track feedback, decisions, source files, and questions in the project workspace so the whole team can act on the same information. To the fullest extent possible, we will aim to keep all project communication inside Outlign so that you always have one place to go for details.

STAGE 3: THE BUILD

Four workstreams move forward at the same time.

Website and portal design, core process building, database construction, and launch preparation happen concurrently. Different people on your team may participate in each track, but your project lead should keep the work connected. From the JourneyCARE team, our Project Manager will be doing the same - monitoring what's happening in each area and ensuring that it all stays connected and on-track.

Build tracks are coordinated, not synchronized.

The work overlaps, but each of our build areas follows its own starting rule and timeline. Launch occurs only when all four tracks are ready.

Starting rule	Work period				Launch gate
Track 1: Website + Portal Begins when the designer starts	Design + approval	Page build	Review + final edits	8 weeks from designer start	Website ready
Track 2: Core Processes Begins in Week 1 of a calendar month	Month 1: four focused build sessions		Month 2: validation + refinements		Processes ready
Track 3: Data + Directory Concentrated in Months 2 and 3	Early sample	Project Month 2: map + prepare	Project Month 3: final import + validation		Data ready
Track 4: Launch Readiness Runs through Months 2 and 3	Plan training	Project Month 2: training + practice	Project Month 3: testing + final approval		Team ready

Track 1: Website + Portal

The design track establishes the visual direction first, then applies it to the pages and portal elements included in your agreement. The eight-week schedule begins when your design work is formally initiated, which may differ from your kickoff date.

Typical schedule

TIMING	ACTIVITY
Week 1	JourneyCARE creates the first-pass homepage design.
Week 2	Gather feedback from staff, board members, and other reviewers internally, then submit one coordinated set of comments through Outlign.
Week 3	The designer applies your requested revisions.
Week 4	Your team confirms the edits. Missed items are corrected and the design direction is finalized.
Weeks 5-6	The remaining contracted pages and portal graphics are built using the approved direction.
Week 7	Your team reviews the build for missing or misplaced content.
Week 8	JourneyCARE completes the contracted final corrections.

How to give useful website feedback

- [ ] Appoint one person to consolidate comments before submitting them.
- [ ] Review first for structure and usability: navigation, priorities, calls to action, and content flow.
- [ ] Then review visual details: imagery, color balance, spacing, and consistency.
- [ ] Use specific language. For example, say “Move the Join button beside Member Login” instead of “This area feels off.”
- [ ] Reference the page name, section heading, and exact text when reporting an issue.
- [ ] Separate corrections from new requests. Missing agreed-upon content is different from adding a new page or feature.
- [ ] Test on both desktop and mobile.
- [ ] Submit one complete round of feedback by the agreed deadline.

Track 2: Core Processes

Four focused sessions cover the core operational areas commonly included in an implementation. Our team begins building immediately from the decisions made in each session, so the right subject-matter experts must attend and arrive ready to explain both the rule and its exceptions.

Your contracted scope may be different from the typical processes included here.

We will confirm which sessions apply to your organization during kickoff.

Typical schedule

Our build team's efforts align with the calendar month

TIMING	ACTIVITY
Build	
1st week of the month	New member joining process
2nd week of the month	Renewal process
3rd week of the month	Events and continuing education process
4th week of the month	Sponsorships and donations process
Validate	
1st week of the month	Your team validates what's been built
2nd week of the month	Our team makes adjustments
3rd week of the month	Your team reviews our corrections
4th week of the month	Launch ready

Build Session 1: New Member Joining

We will map application, approval, payment, onboarding, access, and welcome communications.

Come prepared to:

- ☐ List every membership type and its price options.
- ☐ Confirm whether each type requires approval.
- ☐ Define statuses such as Pending New, Active, Pending Renewal, and Lapsed.
- ☐ Explain what happens from application through activation.

  Include details such as:
  - ☐ *What makes a person an active member?*
  - ☐ *Who approves an application and how will that person be notified?*
  - ☐ *What should happen if payment is incomplete or an application is declined?*

- ☐ Identify any steps that vary by membership type.
- ☐ Confirm whether auto-renewal is required, optional, or unavailable.
- ☐ List the tags, groups, access, notifications, receipts, and emails created at joining.

Build Session 2: Renewal

We will map reminders, renewal payment, grace periods, status changes, access, and lapsed-member follow-up.

Come prepared to:

- ☐ Confirm whether renewal is rolling or on a fixed date.
- ☐ Define the reminder schedule before and after expiration.
- ☐ Confirm the grace period and the exact point when a member becomes lapsed.
- ☐ Explain differences by membership type.
- ☐ Confirm renewal pricing and auto-renewal rules.
- ☐ Define what happens immediately after renewal.
- ☐ Identify members who need special handling during the migration window.

If applicable, plan ahead for these transitional cohorts:

- ☐ Members who were in the renewal process in your old system but hadn’t yet taken action.
- ☐ Members who have a future renewal date but are past the point at which the new JourneyCARE renewal process would trigger reminders.

Build Session 3: Events + Continuing Education

We will map registration, member pricing, confirmations, attendance, evaluations, certificates, and on-demand learning.

Come prepared to:

- ☐ List common event types and whether they are free or paid.
- ☐ Confirm member and non-member eligibility and pricing.
- ☐ Describe what happens immediately after registration.
- ☐ Identify events that award CE and the credit rules.
- ☐ Confirm whether an evaluation or attendance verification is required.
- ☐ Provide certificate requirements and signer information.
- ☐ Explain how on-demand courses are purchased or assigned.

Build Session 4: Donations + Sponsorships

We will map purchase or pledge intake, payment, fulfillment, asset collection, acknowledgement, and internal follow-up.

Come prepared to:

- ☐ List funds, campaigns, sponsorships, advertising options, and prices.
- ☐ Confirm whether donors choose preset or custom amounts and whether recurring gifts are allowed.
- ☐ List assets that you need to collect such as logos, URLs, ad copy, and contact details.
- ☐ Define acknowledgement emails, staff notifications, and follow-up tasks.
- ☐ Identify exceptions by fund, amount, package, or event.

Track 3: Data + Directory

Data work begins early with a sample and finishes close to launch with the final import. This reduces the time your team must manage transactions in two systems.

Early in the project

- [ ] Provide a representative export from the current platform.
- [ ] Tell us which fields should appear in a public directory and which require login.
- [ ] Identify fields that contain sensitive or internal-only information.
- [ ] Flag household, company, chapter, or group relationships that must be preserved.
- [ ] Identify obvious duplicates, missing emails, shared emails, and outdated values.

Final file requirements (ONE WEEK PRIOR TO GO LIVE)

- [ ] CSV format. Excel files can be converted, but JourneyCARE imports use CSV.
- [ ] One contact per row.
- [ ] One field per column with a clear header.
- [ ] No merged cells, subtotals, decorative headings, or blank header rows.
- [ ] A unique email address for each contact whenever possible.
- [ ] Dates in a consistent format.
- [ ] Multi-value fields and tags formatted according to the mapping instructions.

Final import validation checklist

Your team remains responsible for the accuracy and completeness of the information supplied for import. JourneyCARE will assist with formatting and mapping, but your organization must approve the final data before launch.

We recommend completing the following checks:

- [ ] Spot-check a mix of active, pending, lapsed, new, and long-term contacts.
- [ ] Compare total member counts with the old system.
- [ ] Compare counts for each membership level and status.
- [ ] Confirm companies, groups, chapters, and primary contacts are linked correctly.
- [ ] Review board, committee, and other special lists.
- [ ] Confirm directory visibility and privacy choices.
- [ ] Check several renewal dates, join dates, tags, custom fields, and access rules.
- [ ] Report discrepancies before invitations are issued.

Track 4: Launch Readiness

Our unique approach to system training is intended to build your team's confidence so they can start working in JourneyCARE as soon as your account is ready. Starting training early provides maximum date options and an opportunity to repeat sessions if they wish. It also extends practice time before they are expected to begin working in your real JourneyCARE account.

Core Training Areas

TRAINING	PREPARES YOUR TEAM TO
Website Editing	Update pages, images, navigation, events, and news content.
Portal Management	Manage member-facing content, access, groups, and resources.
Contacts + Communication	Work with records, fields, lists, email templates, and messages.
Forms + Automations	Understand the forms and workflows that power core processes.

What to Expect

Each lab session consists of live instructor-led training on a specific topic, followed by dedicated working time in a demo account. Sessions rotate across four areas, and administrators may attend as often as needed.

How to Sign Up

You'll find upcoming dates and times at https://www.journeycare.app/training

The four core topics rotate with each offered at least twice per month.

- Feel free to send as many administrators as you like.
- The topics do not have to be completed in any specific order.
- It is OK for administrators to repeat training sessions for extra practice time.

Launch-readiness checklist

- ☐ Primary administrators have attended the relevant Training Lab sessions.
- ☐ New member joining has been tested from beginning to end.
- ☐ Renewal has been tested for applicable membership types and payment options.
- ☐ Event registration, confirmation, and CE steps have been tested.
- ☐ Donation and sponsorship processes have been tested, if applicable.
- ☐ Email templates have been proofread and sender details confirmed.
- ☐ Custom fields, dropdown options, tags, and smart lists have been reviewed.
- ☐ Directory fields and privacy rules have been reviewed.
- ☐ Additional events, news items, resources, and launch content have been added.
- ☐ Website has been reviewed on desktop and mobile.
- ☐ Final data has been approved.
- ☐ Staff know where to direct questions after launch.

Validating Your Build

Your team will be granted access to your JourneyCARE account as soon as our build work is complete. You are responsible for reviewing the processes included in your implementation and confirming that they follow the rules provided during the build sessions.

For new ideas and desired improvements:
Your team can make the adjustments with the support of Training Lab or Office Hours.

For Build Session deviations:
Report the discrepancy through Outlign so that our team can address.

STAGE 4: THE LAUNCH

Your new website, database, processes, and communications come together.

On launch day, the JourneyCARE team updates your domain so visitors are directed to the new website. The old site stops appearing and the new one takes its place.

Ideally, during the transition:

- You are NOT intentionally driving traffic to the site.
- There is NOT an urgent need for members to be accessing the site.
- You are NOT updating/editing the site.

Publishing Your New Site

The url that is used to access your site will change from the temporary one that we've been using as the site was built and the new site will officially appear at your real domain.
awwwesomeassociation.journeycare.online **changes to** → *awwwesomeassociation.org*

Your old site becomes completely inaccessible from your domain, so if you still need to access your old system, you'll need to ensure that there is an alternate administrative url in place (e.g. awwwesomeassociation.memberclicks.com or squarespace.com)

What to expect when we "flip the switch"

- A brief period of downtime is normal. It may last a few minutes or, in some cases, a couple of hours depending on domain settings.
- Temporary security warnings may appear while the SSL security certificate finishes installing.
- Domain changes can appear at different times for different people and networks.
- Your public launch announcement and portal invitations are typically sent after the site is stable, often the following day.

Launch-day checklist

- [ ] Final launch approval has been given by the authorized project lead.
- [ ] Domain access and responsible contacts are confirmed.
- [ ] Old-system transaction cutoff and reconciliation plan are active.
- [ ] Homepage, navigation, forms, login, and key links are checked once the new site appears.
- [ ] The team knows where to report urgent launch issues.
- [ ] Launch announcement is drafted.
- [ ] Portal invitation rules have been reviewed by membership type, status, and tags.
- [ ] Staff are prepared for member questions about login, profile updates, renewals, and payments.

Launch Announcement / Portal Invitations

JourneyCARE will issue portal invitations when you tell us you are ready. Access is typically based on membership type and status, with additional groups controlled by tags or other agreed rules. Accurate contact data is essential before invitations are sent.

Should you give advance warning to members about the change?

As your launch date approaches (usually a day or two before), it can be very helpful to send an email to members through your old system letting them know that a transition will be happening on that specific date. Remind them that the website will be down for a period as the transition occurs, so if they need to access anything, they should do it ahead of that date. You can also advise them to watch their email for an invitation to the new portal that will be launching.

Addressing Transitional Joins & Renewals

Almost all organizations have membership activity that spans across the old and new platform. Targeted identification of these cohorts and paying extra attention to communication can prevent confusion and reduce the risk of a temporary revenue dip.

Transitional Joins

- [ ] Create a list of new members who joined after data was exported from the old platform.
- [ ] Add their relevant details - membership type, status, join date, renewal date, etc.

Transitional Renewals:

- [ ] Create a list of unpaid renewals from the old system.
- [ ] Create a list of members near renewal who will miss the normal reminder sequence.
- [ ] Send clear instructions with a direct renewal link.
- [ ] Reconcile payments and statuses after launch.

Your First 30 Days Post Launch

Focus first on access, transactions, communications, and the questions members ask most often.

Week 1

- [ ] Monitor login and invitation questions.
- [ ] Check joining, renewal, registration, and payment activity daily.
- [ ] Confirm staff notifications and automated emails are arriving as expected.
- [ ] Record patterns, not just individual questions.

Weeks 2-4

- [ ] Review unresolved migration items and assign owners.
- [ ] Correct confusing instructions or frequently misunderstood pages.
- [ ] Continue Training Lab and use Office Hours for hands-on support.
- [ ] Review smart lists, workflow activity, and key transaction totals.
- [ ] Be mindful of “next improvements” vs. urgent launch corrections.

Initial questions or confusions do not always mean that something is broken.

Early issues usually fall into one of three categories: a true configuration problem, a training or clarity gap, or a new request outside the original scope. Labeling the issue correctly helps it reach the right solution faster.

Post-Launch Support Options

OPTION	BEST FOR	AVAILABILITY
Help Center	Quick lookup in online documentation; chatting with AI-powered assistance	Available 24/7 Access at https://help.journeycare.app/
Help Desk	Quick how-to questions	Typical response time is within 2 hours Monday-Friday 8 am-5 pm US Central Include URGENT in subject line if you need immediate assistance Send email to help@journeycare.team
Daily Office Hours	Strategy questions or problems that are solved most easily if you can share your screen and talk about what you're trying to do	Monday-Friday, 1-2 pm US Central Register at https://www.journeycare.app/officehours
Training Lab	When you need to gain familiarity with a core feature	4 rotating topics, each offered at least twice per month View schedule and register at https://www.journeycare.app/training

What to Expect in Office Hours

Office Hours is a group experience where you can ask questions of our team, alongside other JourneyCARE clients who attend that session. Clients often tell us that they learn a lot from listening in as others ask questions and share what they are working on.

- [ ] Come with prioritized questions.
- [ ] Have the relevant item open.
- [ ] Be ready to share your screen.
- [ ] Bring enough context to explain the goal and problem.
- [ ] Remember that Office Hours is shared troubleshooting and strategy time, not done-for-you account work.

If your questions have been fully answered, feel free to drop off or stay and listen as long as you would like. Some of the best Office Hours discoveries come from hearing someone else ask a question you didn't know you had.

Ready for What Comes Next

A system migration is a significant undertaking, and reaching launch is something worth celebrating. It marks the beginning of a more connected way to manage your organization, serve your members, and support the work happening behind the scenes.

It is normal for questions and new ideas to emerge as your team begins using JourneyCARE in everyday situations. You do not need to master everything at once. Continue building confidence through practice, Training Lab, Office Hours, and the support resources available to you.

We are grateful for the trust you have placed in our team and excited to see what your organization accomplishes with this new foundation.