

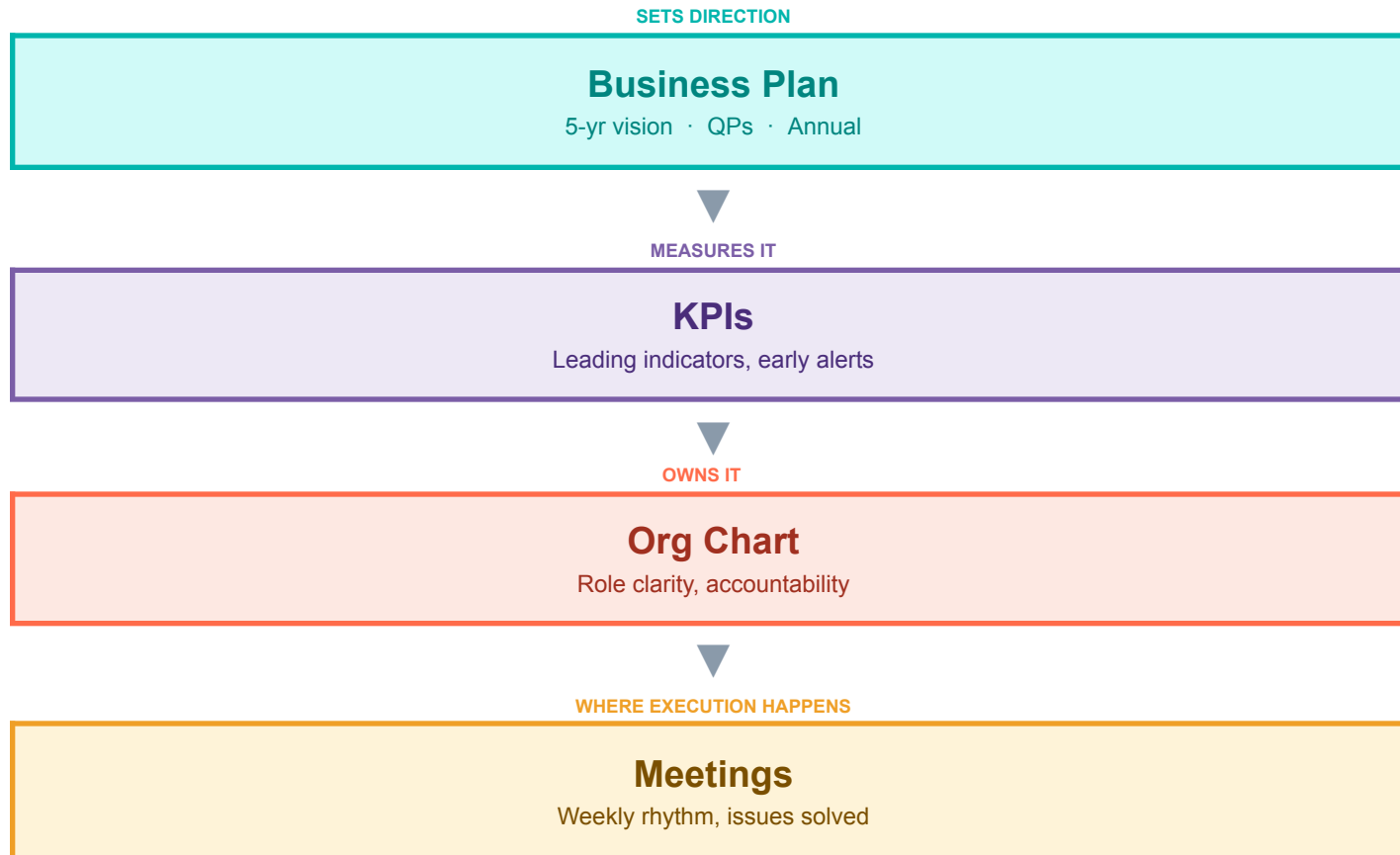
WHAT'S INCLUDED IN YOUR MEMBERSHIP

Dedicated Client Success Manager	Custom Terminology Updates
Unlimited Training & Support	Notification Preference Setup
Data Imports	Knowledge Base Access

KEY STEPS TO IMPLEMENT YOUR GROWTH PLAN

Step	What to Do & Why	Resource
1	Set Up Your Meetings Establish a weekly meeting rhythm, 90-day cycle, and Opportunities & Obstacles for structured accountability.	Running Effective Meetings
2	Build Your Business Plan Start with your 5-year vision and Quarterly Priorities. Your client success manager can help with proven best practices for the plan.	Business Plan Overview
3	Define Your KPIs Identify leading indicators that matter most. Track weekly so your team spots issues early and measures progress.	Setting Up KPIs
4	Complete Your Org Chart Map your structure and assign clear role ownership. Clarity eliminates the gaps where work falls through.	Org Chart Setup
5	Configure Your Workspace Centralize plans, tasks, and documentation in one place. Replace scattered spreadsheets with a single source of truth.	Workspace Guide

How the Components Work Together



Direction flows top to bottom. Execution surfaces back up — every week.
Workspace — one hub for plans, tasks, and documentation

YOU'RE ALL SET

Next Steps

1

Book your kickoff call

Use your Client Success Manager's meeting link to schedule your first success call. You'll walk away with actionable insights based on the best practices they've seen work with thousands of businesses.

2

Work through the key steps

Follow the five implementation steps on page one in sequence. Each one builds on the last — don't skip ahead.

3

Bookmark the Knowledge Base

Your 24/7 resource for how-to guides and troubleshooting. Direct links are included in each step on page one.

4

Set up your notifications

Update [Bloom notification preferences](#) so you never miss a to-do reminder or meeting alert. Ask your Client Success Manager how.

5

Trust the process

Each component of Bloom is intentional and proven. Meetings drive accountability. The Business Plan creates focus. KPIs surface the truth. Org Chart eliminates confusion. Workspace centralizes execution. Together, they work.

Pro Tip

Your Client Success Manager is a strategic partner, not just support. Lean on them to connect Bloom's features to your pain points, guide Business Plan phasing, and grow team adoption.

WE'RE HERE TO HELP

Get Support Anytime

Knowledge Base	help.bloomgrowth.com
Email	help@bloomgrowth.com
Submit a Ticket	bloomgrowth.com/gethelp
Phone	402-478-9545