

# Checklists for MSPs & Clients

## PRE-LAUNCH

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- Does your whole MSP team have access to Hatz AI?
- Do you have a branded sales deck and playbook?
- Has your team completed Hatz Training (Champion & Navigator certifications)?
- Have you had sales training support from Hatz AI?
- Do you know who the decision maker is at the new customer tenant?

## WEEK 1

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- Make sure the client's team has a 100% invite acceptance rate
- Encourage them to bookmark your Hatz AI subdomain in their browser
- Set clear expectations: you want everyone to try the Chat in Hatz at least once this week
- You can even block sites like deepseek.com, openai.com, chatgpt.com, etc

## WEEK 2

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- Check the Tenant's usage stats from the Admin Dashboard
- Let the client know who is - and who isn't - using the platform. Celebrate those who are using it!
- Ask the client about any small wins they've had using the chat
- Remind the client about the Hatz AI Learning Portal, where they can go to get certified and build their confidence using AI

## WEEK 3

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- Continue to monitor their adoption, and see if there are any obstacles to the client getting started
- Come to Feature Fridays and/or Use Case Workshops at least once. Reach out to Hatz for info!

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(Name of person managing this client's AI adoption)