

CASE STUDY

Making Platform Transitions Easier: Two Plus Four's Onboarding Experience








Overview

Two Plus Four Companies transitioned to Fortress OS as their property management software, adopting a centralized platform purpose-built for affordable housing operations. The onboarding experience focused on structured implementation, guided workflows and embedded support tools that helped teams adapt quickly while maintaining data accuracy throughout the migration.

The Challenge: Switching Platforms Without Disrupting Operations

Like many operators moving off legacy systems, Two Plus Four needed to transition quickly without disrupting daily operations.

Key challenges included:

-  Onboarding multiple properties in a short timeframe
-  Ensuring staff could adapt to a new system while maintaining productivity
-  Avoiding data inconsistencies during migration
-  Moving away from a familiar but less structured platform
-  Supporting users with varying levels of comfort with new software

In prior system transitions, training had been limited and largely self-directed, leaving staff to figure things out as they went.

The Solution: Guided Onboarding + Embedded Support

Fortress OS implemented a structured onboarding approach designed to reduce friction and support adoption at every step.

The onboarding experience combined:

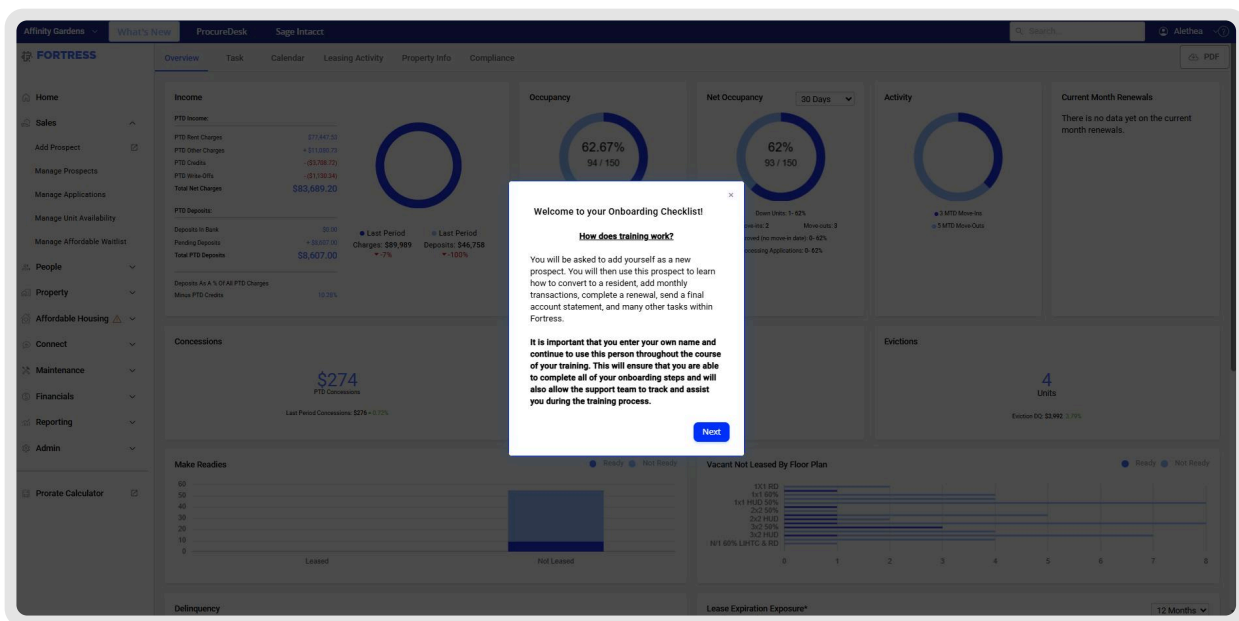
- Step-by-step onboarding through Fortress's native training solution, OnboardMe
- Interactive guided tours powered by WalkMe
- Embedded real-time support through Maven AGI
- A dedicated onboarding team with consistent points of contact



- A structured data verification process during migration
- Instructor-led virtual training sessions delivered in rollout waves

Rather than relying on a single training moment, onboarding was continuous and reinforced through a mix of proactive training and in-platform guidance.

Teams participated in live, instructor-led sessions prior to system access, with additional opportunities to join future trainings as new property groups were rolled out. Some team members attended multiple sessions to reinforce learning across onboarding waves. Users received system access immediately following training, allowing them to apply what they learned right away.



Implementation Experience: Structured, Supported, and Consistent

Despite a fast rollout, the onboarding experience was described as smooth and well-supported.

Staff highlighted:

- Consistent support throughout onboarding without disruptive handoffs between teams



- Proactive training that prepared users before they encountered issues
- Access to real people for support when questions arose
- In-platform guidance that reduced dependency on support tickets
- Hands-on data verification that improved confidence in system setup

Even as responsibilities shifted between onboarding team members, the experience remained cohesive and easy to follow.

Training and Adoption: Learning in Real Time

As users began working directly in Fortress OS, adoption improved through repetition and guided workflows.

WalkMe became a key tool for reinforcing processes in real time, helping staff complete tasks independently and reducing reliance on back-and-forth support.

This was reinforced by earlier instructor-led training, giving users the opportunity to learn the system upfront and apply that knowledge directly within the platform.

Even staff who typically struggle with new systems were able to adapt more quickly due to this combination of live training and embedded guidance.

Data Migration: Structured for Accuracy

A key part of onboarding was migrating and validating legacy data from their previous property management software.

Unlike previous transitions that relied on fast, manual weekend migrations, Fortress required structured verification before go-live.

While this approach involved a more deliberate upfront validation process, it resulted in:

- Cleaner and more accurate property data

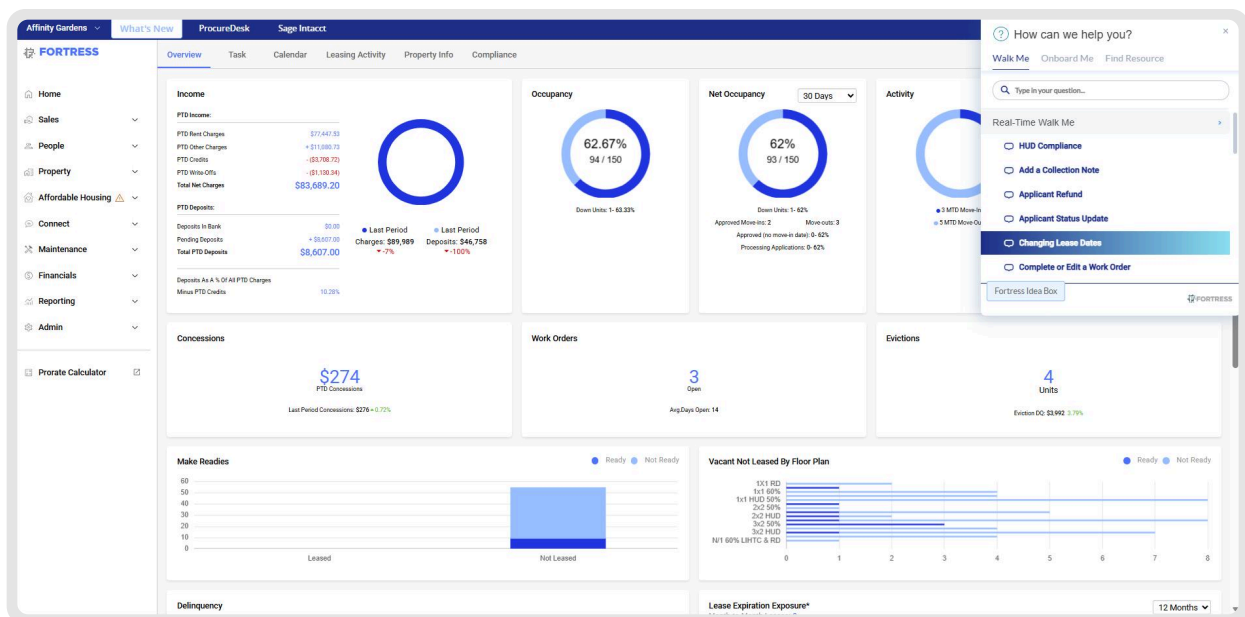


- Fewer downstream corrections after launch
- Stronger confidence in system readiness

Early Impact of Onboarding

Within the onboarding phase, Two Plus Four began seeing early benefits:

- Faster issue resolution using WalkMe guidance
- Reduced reliance on direct support for routine tasks
- Improved confidence navigating the system
- More consistent and accurate data across properties



Ongoing Support Experience: Responsive and Consistent

Support remained a consistent strength throughout onboarding and into daily use of the platform.

The team emphasized that tickets and questions were consistently answered, and when issues arose they did not feel ignored or left unresolved.



This responsiveness reinforced confidence that support remained engaged throughout the process rather than dropping off after implementation.

As shared by Jenica Lawton, VP of Management at Two Plus Four Companies:

“ Tickets and questions are being answered. If an issue arises it doesn't feel like we're being ignored. I have said that from the beginning, Fortress support has been great. ”

Conclusion

Two Plus Four Companies' onboarding experience with Fortress OS demonstrates how structured implementation and proactive support can simplify platform transitions.

By combining guided onboarding workflows through OnboardMe, instructor led training, real time support tools, and a disciplined data verification process, Fortress OS enabled a smooth transition from a legacy system without overwhelming staff. The structured implementation approach helped teams build confidence early while maintaining operational continuity throughout onboarding.

Beyond implementation, the project established a stronger long-term operational foundation for the organization. With accessible training resources, embedded support, and cleaner validated data, users were equipped to adopt the platform more effectively and sustain success well beyond go live.

HIGHLIGHTS

Structured Rollout

Multi-property onboarding completed with minimal disruption

Accelerated Adoption

Embedded guidance helped users learn workflows faster

Clean Data Migration

Structured validation improved data accuracy before launch

Guided User Experience

WalkMe reinforced workflows directly within the platform

Consistent User Support

Teams received responsive guidance throughout onboarding and go-live

