Stages Onboarding Overview: What to Expect, What's Required, and How to Prepare

Stages is not a "plug-and-play" platform.

Instead of relying on operator judgment in the moment, Stages requires monitoring logic to be**designed, reviewed, and configured in advance**. This includes how alarms are interpreted, routed, and handled across your operation.

The onboarding process focuses on:

- Translating real-world monitoring workflows into system rules
- Building structured action plans that enforce consistency
- Ensuring alarms behave predictably before go-live
- Training teams to operate within a rules-driven environment

This upfront effort is what allows Stages to scale reliably once live.

What to Expect During Stages Onboarding

Stages onboarding is a collaborative, phased process involving your team and Bold's implementation resources.

While timelines vary based on complexity, most implementations follow the structure below.

Phase 1: Discovery and Planning

This phase focuses on understanding how your monitoring operation works today and how it should work in Stages.

During this phase, your assigned Project Manager will:

- Coordinate onboarding activities and milestones
- Facilitate discovery discussions
- Align internal resources across teams

Key topics typically include:

- Alarm types and priorities
- Response procedures and escalation paths
- Maintenance and testing practices
- Compliance or regulatory considerations

Outcome:
A shared understanding of how your monitoring workflows will be represented in Stages.

Phase 2: Design and Configuration

This is the most detailed and time-intensive phase of onboarding.

During this phase:

- Action plans are designed, reviewed, and documented
- Dispatch logic and alarm priorities are defined
- Site and device structures are established
- Rules are refined to reflect real operational behavior

Because action plans directly guide operator response, this phase often requires careful iteration to ensure accuracy.

Important to know:
This work cannot be rushed. Time invested here prevents operational issues after go-live.

Phase 3: Testing and Validation

Before any transition to live monitoring, configurations are tested to confirm that alarms behave as expected.

This includes:

- Verifying signal interpretation
- Confirming correct routing and prioritization
- Testing action plan execution
- Reviewing alarm outcomes and historical records

Testing ensures that:

- Operators see the right information at the right time
- Alarms are handled consistently
- Exceptions and edge cases are properly managed

Phase 4: Parallel Operations (Running in Tandem)

For many organizations, transitioning to Stages does not involve an immediate switch from an existing monitoring system.

Instead, Stages is often introduced through a parallel operations period, where Stages runs alongside the existing monitoring platform for a defined amount of time.

During this phase:

- Stages receives and processes live signals
- Alarm behavior is observed and validated in real-world conditions
- Action plans and routing logic are confirmed
- Teams gain confidence in system behavior under live traffic

The existing system continues to operate as the primary monitoring platform during this period.

This approach helps ensure:

- No alarms are missed during the transition
- Configuration behaves as expected
- Operators and supervisors have time to adjust

- The transition occurs intentionally, not under pressure

The length of the parallel operations period varies based on system complexity, operational risk, and organizational readiness.

Phase 5: Planned Cutover to Stages

Once testing is complete and confidence is established, a planned cutover is scheduled.

At this point:

- Stages becomes the primary monitoring system
- Monitoring responsibility transitions fully
- The existing system is retired or reduced in scope, as planned

Your Project Manager coordinates this transition and ensures all stakeholders are aligned on timing, readiness, and next steps.

Phase 6: Training and Enablement

Training occurs throughout onboarding but becomes especially important as go-live approaches.

Training focuses on:

- Operator workflows and alarm handling
- Supervisor oversight and exception management
- Understanding how the system enforces structure
- Best practices for ongoing operations

Stages training emphasizes *how the system works as a whole*, not just where to click.

What's Required from Your Team

Successful Stages onboarding depends on active participation from your organization.

You should be prepared to provide:

- Clear documentation of current alarm handling procedures
- Input on priorities, escalation paths, and exceptions
- Timely feedback during configuration and testing
- Availability for onboarding sessions and reviews

Stages works best when decisions are made intentionally, not reactively.

How to Prepare for a Successful Onboarding

You can make onboarding smoother by preparing in advance:

1. Document Your Current Processes

Understand how alarms are handled today, including exceptions and edge cases.

2. Identify Decision Makers

Stages onboarding requires decisions. Knowing who owns them prevents delays.

3. Expect Iteration

Action plans and rules often evolve during testing. This is expected and healthy.

4. Align Internal Teams Early

Operations, supervisors, and technical teams should be involved from the start.

Why the Effort Is Worth It

While Stages onboarding requires more upfront effort than traditional platforms, it delivers long-term benefits:

- Consistent alarm handling across operators and shifts
- Reduced reliance on tribal knowledge
- Strong auditability and accountability
- Scalable operations without increasing risk
- Clear operational visibility for supervisors and leadership

Stages is designed to support professional monitoring operations — not just process alarms.

A Final Thought for New Customers

If Stages feels structured during onboarding, that's intentional.

The goal is not to make monitoring harder — it's to make it predictable, repeatable, and resilient.

Once live, that structure becomes one of Stages' greatest strengths.

Where to Go Next

To continue building your understanding of Stages, explore:

- What Is Stages and Why It's Different from Traditional Monitoring Platforms
- A Day in the Life of a Central Station Using Stages
- Understanding the Alarm Lifecycle in Stages
- Common Stages Terms and Language

Together, these articles provide a strong foundation for a successful Stages implementation.