Go Live SOP

1. Notification of New Account
    1. Receive via Chatter and/or email after the initial Onboarding client call.
    2. If the Product services include posting, follow the steps below otherwise proceed to section 2:
        - Upon account assignment chatter and in preparation for the upcoming Intro. Meeting, the AC must place a 1-hour time block on their calendar within the next 3 business days.
            1. Time block intentions – AC utilizes the time block to get familiar with the account using the client's current website, analyzing their existing social media and paid ads strategy, Setup Questionnaire (in the Related section of Setup Case in Salesforce), and New Sales notes – request a minimum of 20 graphics to build out the client's main service Deck for 1 month (if photo Case is in progress and set to be complete prior to Go Live, request a minimum of 10 graphic cases)
            2. Set an additional 1-hour time block on your calendar for the following week
                1. Time Block intentions - create the client's new service Deck and Service Group for the account (Optimize Training Camp Facebook Page will need to be used as a social profile placeholder until the account is Live), confirm the Deck settings have paused selected, add content using the Service Group (once the account is Live, you will replace Services in the Group with your actual account social profiles)
                    - Compile additional notes/questions you want to cover within the Intro call.
2. Introduction Meeting
    1. Receive second Chatter from an Onboarding Team member or a Website Team member dependent upon the product once set up is complete and the Intro. Meeting is ready to be scheduled by the corresponding Sales Rep.
    2. See Warm Sales Transfer SOP
3. Update Go-Live Ad Case no later than 5 business days after the Intro. Meeting is completed
    1. Ad Case Status must go from 'New' to 'Ad fulfillment – ad creation'
    2. Complete Quarterly Coaching Case
        1. Do not add contact information
        2. Title should be "Intro. Meeting'
        3. Q Call Type = Intro. Call
        4. Add notes, if applicable
4. Once the account is Live, you will replace Services in the Group with your actual account social profiles and verify Deck settings, including the Pause toggle is off.
    1. Verify access to all applicable platforms
        1. Add Services to HQ

    2. Create a Service List in HQ
    3. Create a service Deck labeled ‘1 – Account Name – FID’
5. Add content to the client’s HQ Deck.
    1. Posting must begin the same business day as the account goes Live.
    2. Submit additional Graphics Cases requests.
    3. Within 90 days of the account going Live, the Deck must meet the Content SOP standards.

Go Live Process for clients with multiple Subscription Products

- All Subscription Products should be set Live as soon as our internal requirements and processes are met unless the service is dependent on another Subscription Product being set Live. (ex. Meta Paid Ads cannot Go Live unless we have access to the Facebook and/or Instagram page to run the ads)
- Onboarding or Website team will chatter and/or the Salesforce Account Owner will receive an automated email for any additional services once ready to Go Live and then the AC will be responsible to follow the Golive process above again, excluding the Warm Sales Transfer process.

Recon Go Live Process - Follow original steps above once out of Recon

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