beanstack

Beanstack New Client Implementation Checklist

Refer to this checklist during your implementation process to ensure you complete all of the steps to successfully launch your site. Happy launching!

Pre-Work:

- ❏ Receive a "Getting Started" email from your Client Success Manager with implementation instructions and the link to your sandbox site.
    - ❏ Fill out the pre-launch information form.
    - ❏ Register for and attend a New Client Kick-Off session hosted by your Client Success Manager.
    - ❏ Log in to your site with the provided credentials and participate in the Welcome to Beanstack challenge to get to know the reader experience and earn administrator access.

Site and Challenge Build:

- ❏ Complete the New Client Checklist. Contact your Client Success Manager if you have any questions about the process.
    - ❏ Configure your site setup, including setting your logging settings, required registration information, site colors, and more.
    - ❏ Give your staff access.
    - ❏ Build your reading challenges.
    - ❏ Customize your landing page.
    - ❏ Test your site, which includes reviewing your Client Success Simulator and submitting your site for quality assurance review, and then launch!

Post-Launch:

- ❏ Complete the post-launch survey sent from your Client Success Manager.
- ❏ Promote your site and challenges to your community. You can use some of our editable marketing materials or create your own!
- ❏ Train and prepare your staff. Consider using our editable quick start guide or creating your own cheat sheet for your librarians.
- ❏ Explore drawings, reports, and insights on your site. Refer to our Helpdesk articles and videos for more information.
- ❏ Fill out a ticket at beanstack.com/support for assistance with your live site.