

# SocialGenius

## Implementation Checklist

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### ■ Pre-Implementation Phase

- %j Kick-off meeting with agency team
- %j Define project goals and success metrics
- %j Identify key stakeholders and project team
- %j Establish communication channels and meeting schedule
- %j Gather list of client Google Business Profiles to be managed
- %j Collect current login credentials and access information
- %j Review existing workflows and processes
- %j Conduct needs assessment survey with agency team

### ■ Account Setup

- %j Create SocialGenius master account for agency
- %j Set up user roles and permissions
- %j Configure white-label branding settings
- %j Connect Google My Business API credentials
- %j Upload initial client location data
- %j Configure notification preferences
- %j Set up billing information and subscription plan
- %j Test admin access and functionality

### ■ Integration Phase

- %j Establish Google API connections for all client accounts
- %j Verify data import integrity for each location
- %j Set up CRM integration (if applicable)
- %j Configure analytics tracking and reporting
- %j Test API connections and data flow
- %j Set up automated backup schedule
- %j Configure single sign-on (if applicable)

%j Verify security settings and compliance

## ■ Automation Configuration

- %j Set up posting schedules for each client
- %j Configure content libraries and templates
- %j Establish approval workflows and rules
- %j Set up automated review monitoring
- %j Configure AI response templates for reviews
- %j Set up automated reporting schedule
- %j Configure performance alerts and thresholds
- %j Test all automation workflows end-to-end

## ■ Training

- %j Schedule admin training session
- %j Schedule user training sessions
- %j Provide access to video tutorials library
- %j Review user documentation and help resources
- %j Conduct hands-on training for daily operations
- %j Train team on reporting and analytics
- %j Provide troubleshooting guidelines
- %j Distribute quick reference guides

## ■ Launch Phase

- %j Conduct pre-launch system check
- %j Verify all integrations are functioning
- %j Test end-to-end workflows with sample data
- %j Finalize transition from previous systems
- %j Set up first automated content schedule
- %j Schedule post-launch review meeting
- %j Activate monitoring and alert system

%j Official system launch

## ■ Post-Implementation

%j 24-hour post-launch check-in

%j 1-week review meeting

%j 30-day performance review

%j Collect initial feedback from agency team

%j Make necessary adjustments to configuration

%j Schedule ongoing training sessions if needed

%j Establish regular check-in schedule

%j Assign dedicated customer success manager