

# SocialGenius

## Implementation Checklist

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### ■ Pre-Implementation Phase

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

### ■ Account Setup

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

### ■ Integration Phase

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