Getting Ready for Go Live

# Project Lifecycle – Where you are

Discovery
We will review your requirements against the ReadyMembership product offering and prepare a gap analysis document. Template or custom design work (if required) will commence.

Build & Data Migration
During this phase we will set up any Directories that may be required. We will start to run early stage Finance Reports as well as undertake Data & Content migration tasks.

Ongoing Customer Success & Support
Go live & support. Your CSM will support you in the transition from project mode to successfully managing the platform. Our client services team will provide you with all the support you need, available by phone, email or the Client Portal.

Training
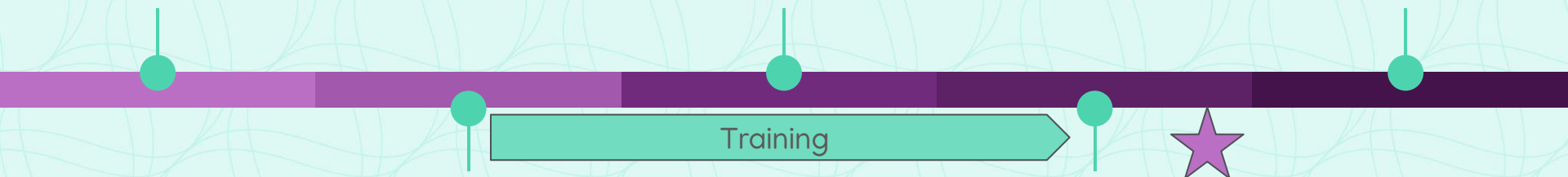
Product Installation & Configuration
Review & sign–off. The ReadyMembership implementation team will install and configure the product in preparation for the build and data migration phase. Membership structures and Finance configuration will be prioritised as early as possible in the process.

Readiness & Go Live
Content upload. This phase is entirely focused on ensuring you are ready for go live. We will concentrate on delivering an agreed training plan for your team(s) to ensure they maximise the potential of ReadyMembership. Final technical checks will also be undertaken followed by a planned and smooth go live.
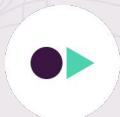
What you need to do

Set up DNS/CloudFlare

Content migration: Ensure any new content that has been published on your old site since you last sent us your content has been recreated on your pre-live site ready for launch

Final data migration date: Send us your final data on this date in the same format as before and freeze any further changes until launch

Communication plan:

Feature launch plan:

Customer relations plan:

Content

- Permissions/Access: Can the right people see the right content?
- Are the assets/images the best size, loading ok and in the correct place with the correct permissions?
- Spelling & grammar
- Have you credited and included copyright on images owned by others

- Links: Have you set up your links to open in new tab?
- Have you set links up with your preferred referral settings?
- Does your home page have a featured image and teaser?
- Are all your URL redirects set up?
- Have you set up all your Meta Descriptions?

Data

Once your final DATA is sent to us, we recommend putting a freeze on your old site to prevent any changes, or if not possible, note these changes and manually update them once your new site is live
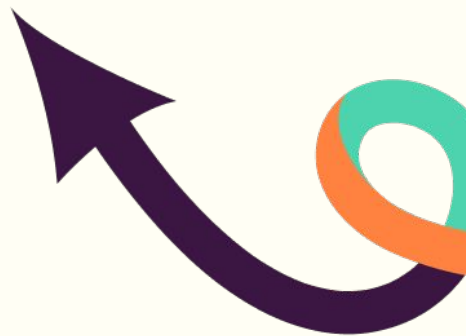
Communication Plan

- Have a clear communication plan for announcing the new site to members, including timing and channels

- Create guides for members including:

  - How to login and reset password

  - Where to edit profile

  - Where to find key features, resources etc.

TIP: Consider a phased approach to inviting members to the new site – don't invite everyone to jump on, on the first day, rather invite members in batches starting with a small sub-section of trusted members who can raise any issues they might find competently and without causing large-scale impact

Future Launch Plan

- If you are launching new features to your members such as Groups or Directories, consider a phased approach after the new site has launched

- Consider launching your directory after a period of time, communicate with members on what's coming and how to update their details in preparation
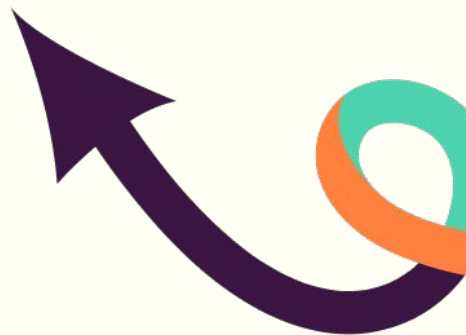
Customer Relations Plan

- Create Guides for your members on how to login, reset their password and update their details

- Create guides on where members can find crucial information

- Set up a Contact us form and ensure you have set up the admin notification email to alert you

- Ensure contact details are easily found

- Ensure there are members of your team available to assist with queries, especially if your method of contact is a phone call.

Security Best Practice

Admin 2FA

To ensure the security of your data, we strongly recommend setting this up. For instructions on setting this up, please see the video below". For any questions or assistance please log a ticket in the Client Portal.

[How to set up your Admin 2FA](#)

Welcome to the ReadyMembership family and thank you!