



Go-Live Admin Checklist

Everything to work through during your preview window, so your team is ready for a smooth go-live.

MONDAY, AUG 3	Preview access opens
AUG 3 – 14	Explore and confirm, at your pace
FRIDAY, AUG 14	Enable final settings
MONDAY, AUG 17	You're live!

Before you go live

Preview access opens Monday, August 3. Between then and Friday, August 14, work through these areas at your own pace. Your team sees none of this yet and email notifications are off by default. Most of this is simply confirming data that carried over, not building it from scratch.

Reminder: all activities are completed in the Admin Panel, not the User Panel.

WORK THROUGH AT YOUR PACE · AUG 3–14

1

Review & update your Company Settings

Make the platform look and feel unmistakably like your organization.

GO TO: Admin Panel → Settings

- ☐ Upload your **logo & favicon**
- ☐ Set your **brand colors**
- ☐ Toggle **ON** the content you want (Kudos & Gamification)
- ☐ If needed, rename content to your own terms

2

Confirm your people & structure

Set up your organization, then make sure everyone is in the right place.

GO TO: Admin Panel → Company → Structure (or) Employees

- ☐ In **Structure**, confirm your locations and departments
- ☐ In **Employees**, confirm your user roster
- ☐ Add any new employees using **+ Add employee** (one at a time) or **Bulk import**
- ☐ Spot check that users' **location, department, and role** are correct

3

Review Fundamentals & content schedule

Define when each piece of content releases to your team.

GO TO: Admin Panel → Fundamentals → Schedule settings

- ☐ Confirm your full list of **Fundamentals**
- ☐ Ensure the **current Fundamental** is correct
- ☐ Spot check that past **Weekly Insights** migrated by opening a Fundamental and then clicking the **Weekly Insight** tab
- ☐ Open **Schedule settings** (top right corner) and confirm/select the content you want to use and the day of the week it should be released

4

Set your email schedule

Decide which emails send and at what time.

GO TO: Notification Setup → Email Setup → Schedule Settings

- ☐ Confirm “**Block all email notifications**” is toggled **ON** until August 14th
- ☐ Enable the **emails** you want sent
- ☐ Confirm the **days and times** for each email

5

Load your Weekly Insight

This is the first thing your team sees on the new platform.

GO TO: Admin Panel → Fundamentals → Upcoming Fundamental → Weekly Insights

- ☐ Confirm your **Insight** is present OR upload your Insight
- ☐ If needing to upload, click on **New Insight**
- ☐ Select the **Author**
- ☐ Input/edit your Insight, use the **+** button to add additional sections of text or video

Final preparations for going live

These items indicate you're ready to move to the new platform. We won't migrate you until you tell us.

6

Re-enter your billing information

REQUIRED BEFORE AUG 14

This connects to our new payment system and must be completed before your team can go live.

GO TO: Admin Panel → Billing

- ☐ Review your **subscription** (quantity of users, rate per user, total monthly fee)
- ☐ Enter your **payment details** securely through Stripe
- ☐ Confirm to **activate** your subscription

7

Click **Conversion Ready**

This is your signal to us that you're prepared to move to the new CultureWise. It does **NOT** initiate sending any emails to your team.

GO TO: Admin Panel → Settings → Conversion ready

- ☐ Toggle "**Mark this company as conversion ready**" ON

8

Set Email Recipients to **Registered & Pending**

This makes sure your emails are sent to every active user, registered or not. From day one, all of your people will receive the correct content.

GO TO: Admin Panel → Settings → Email recipients

- ☐ Select "**Registered and pending**" from the Email recipients drop-down

9

Unblock Email Notifications

FRIDAY, AUG 14

The last switch. Flip it and your team picks up on the new platform without missing a beat.

GO TO: Admin Panel → Notification Setup → Email Setup → Schedule settings (top right corner)

- ☐ On **Friday, August 14**, toggle "**Block all email notifications**" OFF