8. Pre and Post Launch Checklists

We've compiled a simple pre- and post-launch checklist to ensure a smooth and successful launch. Taking a few moments to review these items will set you up for optimal results from the start.

Before Your Pre-Launch Call: Laying the Foundation

This initial call with your dedicated account manager is a crucial step. Come prepared by ensuring you've ticked off the following:

- **Did you read the Knowledgebase twice?** Our comprehensive Knowledgebase holds a wealth of information designed to answer many of your initial questions and provide valuable insights into our processes. A thorough understanding here will make our partnership even more effective.
- **Have you familiarized yourself with the terms and conditions of the agreement?** Understanding the specifics around renewals, pauses, payment structures, and your ongoing obligations is key to a transparent and mutually beneficial relationship.
- **Is your pre-launch call scheduled with your account manager?** If not, please reach out to coordinate a time that works for both of you.
- **Have you received a copy of the sales presentation?** Reviewing this will give you a clear understanding of how **FinanceVine** generates leads and the value proposition for potential clients.
- **Have you logged into** clients.financevine.ca **and familiarized yourself with the self-serve portal?** This portal is your hub for managing leads, tracking progress, and accessing important resources. Getting comfortable with it early on will save you time later.
- **Do you have your (if any) questions prepared for your pre-launch call?** This is your opportunity to clarify any points and ensure you have all the information you need.

After Your Pre-Launch Call: Getting Ready to Grow

Once you've connected with your account manager, confirm the following to ensure a seamless transition into receiving leads:

- **Did you confirm when you'll be added to the lead flow from your account manager?** Knowing the timeline allows you to plan accordingly.
- **Did you receive a copy of the pre-launch materials?** This may include additional resources discussed during your call.
- **Do you know the helpdesk email?** Having this handy will allow you to quickly reach our support team if any issues arise.
- **Do you know your account manager's direct phone number?** Maintaining direct communication with your account manager ensures efficient support.
- **Anything else you require before receiving your first lead?** Don't hesitate to voice any remaining needs or concerns. We're here to support you every step of the way.

By completing these simple checklists, you'll be well-prepared to leverage **FinanceVine's** systems and connect with qualified leads.