

## ONBOARDING LAUNCH PROCESS

An “at a glance” look into launching all three products

### 1. ORDER RECEIVED

A Product Specialist will begin the Onboarding Journey with all three products ShopperSuite, Lifecycle, and Nitroleads.



### 2. KICKOFF & VERIFICATION

**SHOPPERSUITE:** The Product Specialist will be pending the onboarding document and order the DMS if required.

**LIFECYCLE:** The Product Specialist will be pending the onboarding document and order the DMS. If there is an issue with the dealer finding the lead “from address,” their CRM support will have them Whitelisted to bypass any privacy walls.

**NITROLEADS:** The Product Specialist will be pending the onboarding document and Facebook access if required. If there is an issue with the dealer finding the lead “from address,” their CRM support will have them Whitelisted to bypass any privacy walls. For more info look here:

[CRM Leads Troubleshooting](#)



### 4. CREATIVE PROOFING & APPROVAL

**SHOPPERSUITE:** The Creative Team will design and proof all marketing materials. Once creative is internally proofed, a Designer will let you know it can be sent out for Client Approval.

**LIFECYCLE:** The Creative Team will design and proof all marketing materials. Once the email banner and/or geo fencing ads are internally proofed, a Designer will let you know it can be sent out for Client Approval. The Creative Team will also provide us with a logo to be used for SmartMail.

**NITROLEADS:** The Creative Team will design and proof all marketing materials.



### 3. TECHNICAL CONFIGURATION

**SHOPPERSUITE:** The Product Specialist will then add the new client to the ShopperSuite dashboard and send the FT Script for install on the client’s website. Once this is installed, data collection begins.

**LIFECYCLE:** The Product Specialist will then add the new client to the Lifecycle dashboard and proceed to set up their portal. Once DMS Feed is acquired, data will start to process through our internal systems.

**NITROLEADS:** Next, the Product Specialist sets up the campaign and the client is added to the portal. The script is then added and triggering is set up.



### 5. PRODUCT LAUNCH

Finally, the Product Specialist will provide a quality check on all three product portals.

**SHOPPERSUITE:** Once the Product Specialist receives creative approval and confirms households are tracking, they can set the campaign to the correct exports in the dashboard and your client will be live.

**LIFECYCLE:** They will work with Client Services in confirming receipt of a real lead pushed to the client’s CRM. Once confirmed, the Product Specialist will enable the Lifecycle campaign. The campaign will then be set to active and the client will be live.

**NITROLEADS:** The Product Specialist will upload the approved graphics, then the campaign will be set to active and the client will be live.

