

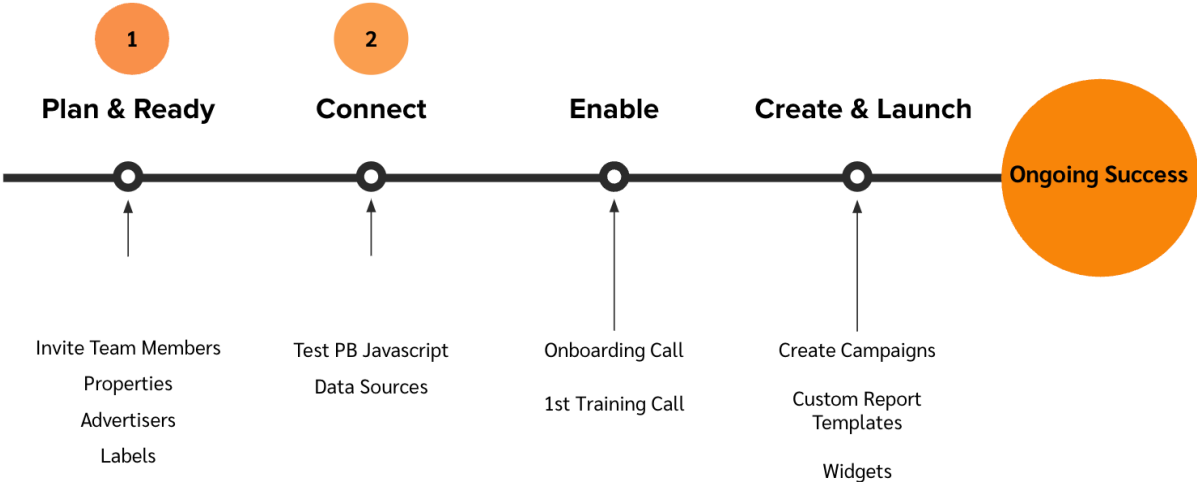
# Pressboard Self-Start Onboarding Guide

## Approach

Our self-start approach is designed to assist you with getting set-up in Pressboard and building toward launching your first campaigns and client facing reports with ease.

The approach consists of four phases of which this guide covers the first two: **Plan & Ready > Connect > [Enable > Create & Launch]** which are expected to be complete by the end of **week one**. The first touchpoint - Onboarding Call - with your Customer Success Manager concludes the Self-Start phase and in the following phases they will lead you on deeper training & enablement to drive value and success long term.

## Phases



The below table outlines the activities we set in motion from the moment you're granted access to your Pressboard organization. These steps are foundational to seeing success quickly and achieving your longer term business aims.

Category / Theme	Activity	How-To	Week 1	Week 2+	Week 4+
Connect	Connect all data sources	<a href="#">LINK</a>	✓		
Connect	Deploy and test PB	<a href="#">LINK 1</a>	✓		

	Analytics Javascript	<a href="#">LINK 2</a>			
Plan & Ready	Invite Team Members Add Properties Add Advertisers	<a href="#">LINK</a>	✓		
Plan & Ready	Add Labels	<a href="#">LINK</a>	✓	✓	
<b>Self Start is complete!</b>					
Enable	Onboarding Call		✓		
Create	Create Campaigns / Story Reports	<a href="#">LINK</a>	✓		
Create	Create Custom Report Templates	<a href="#">LINK</a>		✓	
Enable	First Training Call			✓	
Create	Data Explorer widgets & dashboards	<a href="#">LINK</a>			✓
Enable	Regular Touchbase*				✓

## Knowledge Base

Helpful resources from our [Help Centre](#) are linked below:

- [What We Measure](#)
- [Pressboard FAQ's](#)
- [Glossary of Terminology](#)
- [Adding Members](#)
- [Adding Properties](#)
- [QA Pressboard Analytics Script](#)

## Who needs to be involved ?

<b>Main Point of Contact</b>	Leads the communication and funnels feedback from internal teams to Pressboard. They will own the adoption effort in partnership with Pressboard's customer success manager.
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<b>Website Manager / Web Ops Team</b>	Responsible for deploying JS to sponsored content web pages in accordance with our code instructions.
<b>Executive Sponsor</b>	Provides overall direction for the project and ties us back to the organization's strategic goals and requirements. Secures team resources internally.

**Assumptions**

- Customer will be provisioned with the relevant credentials in each external platform to connect the necessary Data Sources in Settings. It's recommended that the same user who has these permissions connects all relevant data sources. They must be assigned the 'Admin' user role in Pressboard.
- Customer's web manager is required to add the Pressboard Analytics javascript to html code of the website or tag management solution. The code will be available in Settings > Data Sources within your Organisation (accessible by 'Admins' only).
- Pressboard Customer Success Manager can assist with validating and testing the script, if needed. A link to our step-by-step testing instructions is included in this guide (see table above).
- User access; at least one active Admin is created in the account to initialize access to the Organisation. The Admin can add more users and assign user roles as needed.
- Customer will provide feedback in a timely manner on non-standard metrics pertaining to any Data Source, if specific requirements were not communicated during technical scoping.
- Customer Success touchpoints - schedule a weekly call for the first 4 weeks and agree to regular cadence thereafter (bi-weekly or monthly)

**Customer Success**

As your Customer Success Manager, it is my responsibility to ensure our clients receive best in class support throughout all stages of their relationship with Pressboard.

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Let's get started with your onboarding experience!