



Eminify Client Onboarding Guide

Welcome

We're excited to partner with you. This guide outlines how we onboard new Eminify clients, what the journey looks like, and the information we need to launch your engagement smoothly.

Engagement Snapshot

- **Primary contact:** hello [AT] eminify.com
- **Typical timeline:** 10–14 weeks from discovery to initial launch (varies by scope)
- **Delivery model:** Dedicated cross-functional pod (product, design, engineering, QA, automation)
- **Core tools:** Slack/Teams, Notion or Confluence, Linear/Jira, Figma, Loom, Zoom/Google Meet

Pre-Kickoff Checklist

Item	Owner	Details
Signed MSA & Statement of Work	Client & Eminify	Confirm approvals and procurement steps are complete.
Initial invoice / retainer	Client	Pay per SOW terms to secure the start date.
Stakeholder roster	Client	Share decision makers, subject-matter experts, and technical contacts.
Access & credentials	Client	Provide analytics, CMS, repositories, staging environments, and brand assets.
Project brief & success metrics	Client & Eminify	Align on business goals, KPIs, launch criteria, and constraints.
Communication channels	Eminify	Invite your team to the shared Slack/Teams channel and knowledge base.

Kickoff Meeting Agenda (90 minutes)

1. Welcome & team introductions
2. Engagement objectives, KPIs, and constraints
3. Review of existing assets, user insights, and market context
4. Delivery roadmap and collaboration cadence
5. Technical considerations (integrations, compliance, security)
6. Decision rights and approval workflows
7. Next steps, outstanding dependencies, and Q&A

Delivery Phases

Phase	Duration	Focus
Discovery & Alignment	1–2 weeks	Workshops, analytics review, journey mapping, technical audit, roadmap confirmation.
Experience & Architecture	2–3 weeks	UX flows, content strategy, design system application, architecture diagrams, backlog shaping.
Build & Automation	4–6 weeks	Iterative development, integrations, QA automation, analytics instrumentation, preview environments.
Validation & Launch Prep	2 weeks	UAT, performance and security checks, content freeze, launch plan finalization.
Launch & Optimization	1 week + ongoing	Production release, hypercare, metric tracking, optimization backlog.

Collaboration Rhythm

- **Weekly standup (30 mins):** Track progress, blockers, and upcoming milestones.
- **Bi-weekly steering review (45 mins):** Demo new work, review KPIs, align on roadmap adjustments.
- **Async updates:** Weekly written summary plus Loom walkthrough for stakeholders who prefer asynchronous updates.
- **Support channel:** Dedicated Slack/Teams space with a <1 business day response SLA.

Approvals & Decision Matrix

Area	Primary approver	Expected turnaround
UX/design concepts	Client product/marketing lead	2–3 business days
Copy & content	Client communications/marketing	2 business days
Integrations/security	Client engineering or security lead	3–5 business days
Launch go/no-go	Joint leadership (client + Eminify)	Same day within launch window

Deliverables You’ll Receive

- Research summaries, workshop notes, and customer journey artifacts
- Figma design files (responsive layouts, component documentation)
- Technical architecture diagrams and integration plans
- Prioritized backlog in Linear/Jira with clear acceptance criteria
- Working staging environments with automated test coverage
- Launch checklist, rollback plan, and post-launch analytics dashboard

Managing Change Requests

1. Log the change request and business rationale in the shared backlog.
2. Eminify reviews impact on scope, timeline, and budget.
3. We present options (absorb, defer, or formal change order) with revised estimates.
4. Approved changes are scheduled and communicated during the next steering review.

Billing & Invoicing

- Invoices follow the cadence defined in the SOW (retainer, milestone, or time & materials).
- Standard payment terms are net 15; late payments beyond 21 days pause active delivery.
- Approved out-of-pocket expenses (licenses, travel) are billed separately at cost.
- Finance questions: billing [AT] eminify.com.

Security & Access

- Eminify enforces SOC2-aligned practices: MFA, least-privilege access, encrypted storage.
- Share credentials through approved secrets managers—never via email or chat.
- For regulated engagements (HIPAA, NDPR, GDPR, PCI), we execute the necessary agreements before data access.
- Report incidents immediately to security [AT] eminify.com.

Launch & Transition

1. Validate analytics, monitoring, and alerting are live.
2. Execute the launch checklist and rollback plan during an agreed window.
3. Monitor KPIs throughout the 5 business-day hypercare period.
4. Transfer documentation, credentials, and runbooks to your internal teams.
5. Conduct a joint retrospective to capture wins and future optimizations.

Post-Launch Support Options

- **Enhancement retainer:** Continue with the same pod for roadmap execution and experimentation.
- **Support SLA:** Defined response times for incidents, content updates, and small enhancements.
- **Enablement & training:** Workshops for your teams covering design systems, analytics, and automation tooling.

Key Contacts

Role	Contact	Purpose
Engagement lead	ola [AT] eminify.com	Day-to-day delivery oversight

Design director Role	ada [AT] eminify.com Contact	Experience strategy & reviews Purpose
Engineering lead	jordan [AT] eminify.com	Technical decisions & integrations
Finance	billing [AT] eminify.com	Invoices, payments, procurement

We're committed to a seamless onboarding experience. If any step feels unclear, reach out and we'll schedule time to align. Welcome to Eminify.