# Phase 2 – Cloud Configuration - Checklist v28

**Purpose:**

This phase will consist of acquiring access to all raw data in order to configuring and/or verifying accuracy of data collection mechanisms, services, and software.

The report generated will include any digital marketing campaign results, standard analytics reports, baseline report and Phase(3) recommendations, configuration, and cost.

Client: _____     Date: _____

Title: _____     Employee: _____

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**PHASE 2 – TASK 1: SITE CONTROL: (TECHNOLOGY) (PRM)**
**Completion Timeframe: <u>24 – 48hrs after Phase 2 Contract Signed</u>**     **Start Time: _____ End Time: _____**

☐ **0 – Password List:** ☐ YES ☐ NO ☐ NA     **WHO:** _____

☐ **1 – Control Domain:** ☐ YES ☐ NO ☐ NA     **WHO:** _____
   Username: _____
   Password: _____

☐ **2 – Control DNS:** ☐ YES ☐ NO ☐ NA     **WHO:** _____
   Username: _____
   Password: _____

☐ **3 – Control Web Hosting** ☐ YES ☐ NO ☐ NA   **WHO:** _____
   Username: _____
   Password: _____

☐ **4 – Control Email Hosting** ☐ YES ☐ NO ☐ NA   **WHO:** _____
   Username: _____
   Password: _____

☐ **5 – Control Site Access** ☐ YES ☐ NO ☐ NA     **WHO:** _____
   ☐ **HTML** ☐ **WordPress** ☐ **OTHER:** _____
   Username: _____
   Password: _____

☐  **0 – Change client status in CMS**

☐  **1 – Add Project File structure to Client in CMS**

☐  **2 – Move Client Dropbox <u>Folder</u> to "1_Cradle - Infant" Section[1]**

☐  **3 – CompanyName@gmail.com**          ☐ Skip

          Username: _____

          Password: _____

          Recovery Email: _____
          Recovery Phone: _____

☐  **4 – Google Analytics**
        ☐ Setup Analytics
        ☐ Link to 7thpowerinc@gmail.com (Added at property level)
        ☐ Account     ☐ Property     ☐ View
        ☐ UA- _____
        ☐ GA-4 property-id _____
        ☐ Request Access to GA          **WHO:** _____
        ☐ Date Requested: _____  ☐ Date Completed: _____

☐  **4.5 – New Google Analytics View** (If 'All Web Site' is only view)
        ☐ View Name: _____

☐  **5 – Setup Site Goals/Events**     ☐ Skip

      Goal/Event 1: _____

      Goal/Event 2: _____

☐  **6 – Build Google Analytics UA & GA4 Dashboard(s)**     ☐ Skip
        7thPower          ☐ Standard  ☐ eMail     _____
                      ☐ Advertising ☐ eMail     _____

☐  **7 – Create Google Saved Shortcuts (UA only)**          ☐ Skip
        ☐  7thPower

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[1] Do this step in the web version of Dropbox

☐ **8 – Configure Webmaster Tool(s)**                    ☐ Skip

    Google         ☐ Verified  ☐ Not Verified   **WHO: _____**

        Username: _____

        Password: _____

    ☐ Date Requested: _____ ☐ Date Completed: _____
    ☐ Link to 7thpowerinc@gmail.com

    Bing            ☐ Verified  ☐ Not Verified   **WHO: _____**

        Username: _____

        Password: _____

    ☐ Date Requested: _____ ☐ Date Completed: _____
    ☐ Link to 7thpowerinc@gmail.com

☐ **9 – Link Google Search Console to Google Analytics**    ☐ Skip

☐ **9.5 – Setup Google Tag Manager**            ☐ Skip

    Account name: _____

    Container name: _____

☐ **10 – Add Google Analytics code to Client Website**    ☐ Skip

☐ **11 – Claim Google my Business Profile**    ☐ Skip    **WHO: _____**

    Username: _____

    Password: _____

  a. Owner / Doctor     ☐ UTM  ☐ Verified  ☐ Link to 7thpowerinc@gmail.com
  b. Business / Practice  ☐ UTM  ☐ Verified  ☐ Link to 7thpowerinc@gmail.com

☐ **12 – Claim Bing Places for Business Profile**    ☐ Skip    **WHO: _____**

    Username: _____

    Password: _____

  c. Owner / Doctor     ☐ UTM  ☐ Verified  ☐ Link to 7thpowerinc@gmail.com
  d. Business / Practice  ☐ UTM  ☐ Verified  ☐ Link to 7thpowerinc@gmail.com

☐ **13 – Yelp Profile**        ☐ Skip        **WHO: _____**

    Username: _____

    Password: _____

  a. Business    ☐ Verified    ☐ Link to 7th Power Yelp

☐ **14 – Search Engine Campaign(s)**        ☐ Skip
      a.   Google Ads  # _____        **WHO:** _____ ☐ Skip
      ☐ Link to [7thpowerinc@gmail.com](mailto:7thpowerinc@gmail.com)
      b.   Bing Ads     # _____        **WHO:** _____ ☐ Skip
      ☐ Link to [7thpowerinc@gmail.com](mailto:7thpowerinc@gmail.com)

☐ **15 – Link Google Ads & Google Analytics**        ☐ Skip

☐ **16 – Link Google Ads & Search Console**        ☐ Skip

☐ **17 – Link Bing Ads & Google Analytics (Tracking Code)**   ☐ Skip

☐ **18 – Create Client Dropbox Account**        ☐ Skip        ☐ Link Folder

      Username: _____

      Password: _____

☐ **19 – Update Client "Login" <u>Excel sheet</u>** ☐ Skip

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| PHASE 2 – TASK 3: PRACTICE DATA: (BUSINESS) | ☐ Skip |
|---|---|
| Completion Timeframe: <u>24 – 48hrs after Phase 2 Contract Signed</u>        Start Time: _____ End Time: _____ | |

☐ **Accounting Software**
    ☐ QuickBooks v_____
    ☐ Other (_____)
        Username: _____
        Password: _____

☐ **Practice Software**
    ☐ ChrioTouch v_____
    ☐ ChrioFusion v_____
    ☐ Dentrix v_____
    ☐ Eaglesoft v_____
    ☐ Open Dental v_____
    ☐ Other (_____)
        Username: _____
        Password: _____

☐ **Appointment Software**
    ☐ LegWork PRM
    ☐ Other (_____)
        Username: _____
        Password: _____

☐ **Reminder Software**
 ☐ LegWork PRM
 ☐ Other (_____)
   Username: _____
   Password: _____

☐ **Survey / Review Software**
 ☐ LegWork PRM
 ☐ Other (_____)
   Username: _____
   Password: _____

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**PHASE 2 – TASK 4: BASELINE DATA**
Completion Timeframe: <u>7 – 10 days after Phase 2 – Section 2 is Completed</u> Start Time: _____ End Time: _____

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☐ _____    **SAVE SCREENSHOTS AS .PNG**

**Dashboard (1)**
 ☐ 0 – Google Analytics Standard Dashboard _____

**Internet Campaign (2) {Snagit to Dropbox Folder}**
 ☐ 1 – Ad Groups  _____
 ☐ 2 – Keywords  _____

**Google Analytics (7) {Export PDF to Dropbox Folder}**
 ☐ 3 – Home > Dashboard  _____
 ☐ 4 – Audience > Overview: City (10)  _____
 ☐ 5 – Audience > Mobile > Overview (pie chart)  _____
 ☐ 6 – Acquisition > All Traffic > Channels (pie chart)  _____
 ☐ 7 – Acquisition > All Traffic > Source/Medium (10)  _____
 ☐ 8 – Acquisition > Search Console > Queries (25)  _____
 ☐ 9 – Behavior > Site Content > All Pages (25)  _____

**Moz (5) {Snagit to Dropbox Folder}**
 ☐ 10 – Dashboard  _____
 ☐ 11 – Ranking (Competition)  _____
 ☐ 12 – Site Crawl  _____
 ☐ 13 – Links  _____
 ☐ 14 – Site Traffic  _____

**Phase (3) (1)**
 ☐ 15 – Phase (3) Cloud_____

**PHASE 2 – TASK 5: PHASE 2 REPORT (BASELINE)**
Completion Timeframe: <u>1 days after Phase 2 – Section 4 is Completed</u>   Start Time: _____ End Time: _____

☐ **Build Report _____**

☐ **Assemble Report _____**

☐ **Review Baseline Report _____**