CrownPeak
WEB EXPERIENCE MANAGEMENT

Transition to Support Playbook

Version 1.1

Document History

Author/Editor	Date	Reason for Change	Version
Ken Snyder	06/12/2014	Original	1.0
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Transition to Support Overview

For clients preparing to launch their first site, it is imperative that a handoff to support occurs. During this process a client is introduced to the support department. The support team receives a high-level review of the client's instance and site, a list of client contacts, details about any special client requirements, and a review of client roles definition.

In addition, the handoff provides CrownPeak's support team with increased awareness of the client’s initial go-live event. This information ensures the support team can offer a high level of responsiveness to the client at launch to ensure their first experience with CrownPeak is a positive one. This document provides a list of documents and steps required to complete the transition successfully.

Transition Document

Required for Each New Site

Items in this first section are required for each site that is transitioned to support. These details should be provided to support for each new site created, even for clients with existing relationships with support.

Instance

Instance should be the CrownPeak Platform instance name. Typically it is the client name but can be a variation of that name.

Sites

Sites should be a list of the sites that are part of the transition to support. Typically in an initial go live, it is the first site developed within the instance, though the instance may contain more than one. This list should include stage and live, noting the live courtesy domain in addition to the actual live domain.

Hosting Information

Note hosting as either CrownPeak or client hosted. CrownPeak is applicable for any hosting where CrownPeak manages hosting. Client can mean any hosting provider not managed by CrownPeak.

Go-Live Dates of Sites with CrownPeak

This should list the expected go-live date in which the site(s) are expected to be cut over to CrownPeak and normally ties into a DNS Change event. Note: This does not represent when the content is “LIVE” in CrownPeak Platform, only when the public URL is accessible.

Overview of Sites: Site Summary

This section should provide a high-level outline of site structure and architecture. Key elements should be outlined in this section and include the following type of information:

- Type of site (e.g., internet, intranet, marking site, microsite, etc.)
- Framework of site (e.g., .NET 4.0, JSP, ASP, etc.)
- General configuration information about the site
- High-level site structure / folder structure
- Any additional key items that can help outline the site

Implementation Notes

For this section document any key implementation notes, including any special configurations used for implementation. Items here should be covered during the transition meeting and outline key implementation details.

Required for Initial Client Go Live Only

Items in this section are only required for a client’s initial go-live transition to support. For subsequent sites this section is generally not required, unless the existing client configuration will be drastically changed.

Client Contacts

Client contacts should include a list of primary client contacts, as well as a list of agency contacts or third-party developers who will remain actively involved with the customer. Note titles and/or key roles for each contact as applicable.

All contacts should also be added to Salesforce.com. For any contact requiring notification of releases and system events, select "Notification" as the contact type when adding them to Salesforce.com.

Client Requirements

Items entered under client requirements are intended to capture client needs for the transition--i.e., until a client requirements document is created. The primary difference is this document is time-specific to site(s) transition, whereas the client requirements document is maintained and updated for the duration of a client's relationship with CrownPeak.

Examples include:

- Support requirements
- Editing guidelines
- Deployment guidelines
- Development guidelines
- Security guidelines
- Time entry

Access Definition

Provide a summary definition of client roles. This is key when managing ACLS after the site is launched as there may be corrections necessary. This section helps document roles as the client has defined them, providing a way to validate issues that may arise.

Transition Meeting

Required Attendees

- Management consultant or project lead
- Representatives from support (minimum of one, preferably multiple)
- IT resource when applicable (IT is generally an optional attendee, but should be included if special requirements or site configuration justifies their presence.)

Goals of the Meeting

- Introducing any new clients to support
- Providing notification of pending client go live
- Creating a unique view group for each unique "section" in the CMS (Each unique section will then only configure the appropriate view group for all of the CMS "view" access.)
- Applying view groups to site root folders, site country folders (when applicable), model root folders, and template root folders

Client Introduction to Support

Introduction to Support Process

In addition to familiarizing support with a client and their needs, it is important that the client is properly transitioned as well. Providing the customer with the "Welcome to Support" document, which outlines key aspects of their transition from being an active project to being handled by the support team, is essential to accomplishing this goal. This document includes:

- Support contacts
- Escalation procedures
- Outline of proper support request process

Notes and Additional Information

The transition to support process is used primarily for initial site launches, but can be repeated for additional site launches as well. The client transition to support should be uncomplicated for all parties involved.