

# RebelMouse

## Client Onboarding Requirements

Week-by-Week Checklist & Information Guide

# Onboarding Overview

This document outlines everything RebelMouse needs from a new client to ensure a smooth, on-time launch. It is divided into phases and weeks so both the Onboarding Manager (OM) and the client know exactly what is expected and when.

<b>Phase 0</b>	Pre-Onboarding — Contract signed → Kick-off call (Days 1–3)
<b>Week 1</b>	Discovery & Access — All credentials, accounts, and assets collected
<b>Week 2</b>	Content & Taxonomy — Content audit, migration mapping, taxonomy confirmed
<b>Week 3</b>	Monetization & Integrations — Ads, analytics, newsletters, third-parties
<b>Week 4</b>	Pre-Launch QA — Testing, training, sign-off

**PRE-ONBOARDING** · Days 1–3 after contract signed

## Pre-Onboarding & Project Kick-Off

### What We Need From the Client

- Onboarding Questionnaire:** Fully filled out by Sales / Client before the kick-off call (business description, goals, KPIs, team contacts, revenue sources, current tech stack).
- Signed Contract:** Final executed contract available and linked in the project.
- Sales Handoff Notes:** All notes from sales calls, scoping spreadsheet if applicable, and any special commitments made.
- Primary Contacts:** Technical POC (e.g., Eric Bui) and Editorial POC (e.g., Kayla Gagnet) confirmed with email addresses and availability.
- Migration Window Agreed:** 90-day (or negotiated) migration window confirmed and in the project timeline.

### Internal OM Actions

- Schedule internal kick-off call with subject: INT [ClientName] / RebelMouse Kick Off Call.
- Schedule external client kick-off call.
- Create project in Jira from BP template and share project link with the team.
- Set up shared Slack channel with client (if applicable).
- Create project folder in Google Drive and share contract, questionnaire, and notes.

## Discovery & Access

### 1.1 — Business & Editorial Information

Collect all editorial and business context needed before any build work starts.

- Business description:** Short paragraph describing the publication, audience, and editorial mission.
- Goals & KPIs:** Traffic targets, revenue goals, subscription targets, interaction metrics, etc.
- Success metrics:** How the client measures success (Pageviews, UVs, RPM, subscription rate...).
- Articles per day:** Average number of articles published daily.
- Editorial team size:** Number of editors/writers and their workflow (CMS, tools used today).
- Competitors:** Direct and indirect competitor URLs.
- Taxonomy / Section structure:** Confirmed list of sections and sub-sections (should not change during migration). Tags list if applicable.

### 1.2 — Technical Access & Credentials

All technical access must be granted in Week 1 so development is not blocked.

- Domain & DNS:** Access to DNS settings (or confirmation that client IT can make changes within 24 h). Current registrar documented.
- Current CMS / Platform:** Login or API access to existing CMS for content export/migration (WordPress, Arc, Chorus, custom, etc.).
- Ad Server access:** Confirm your team already has access from other properties, or provide new credentials (GAM/DFP or other).
- CDN / Hosting:** Any existing CDN (Fastly, Cloudflare, Akamai) — account access or contact at provider.
- Analytics:** Google Analytics / Parse.ly / Chartbeat — admin access or read-only token. Note any other analytics platforms in use (e.g., Marfeel).
- Social accounts:** Confirm all social handles are correct: Facebook, Instagram, X/Twitter, Threads, TikTok, YouTube, Bluesky.
- OpenAI API key:** If AI features are in scope, client provides an OpenAI API key (or OM sends instructions to create one).
- Vault access:** Coordinate with Igor Demko for vault creation/access. Provide client name, domain, and admin email.

## Content Audit & Migration Mapping

### 2.1 — Content Inventory

The client should share a full content inventory so the migration team can plan the import.

- Content export / data dump:** Full export from existing CMS (articles, galleries, pages, redirects). Initial dump can be shared before contract close for discovery.
- Content volume by type:** Confirm counts: Articles, Galleries, Bundles, Tag Pages, Contributors, Info Pages, Native Articles/Galleries, Products, Redirects.
- Photo library:** Total photo count, credit/licensing info (e.g., Getty Images credits must be mapped). Confirm hosting solution post-migration.
- Authors / Contributors:** Full list of contributor profiles and bios to migrate.
- URL structure:** Current URL patterns — any URL changes or 301 redirects required must be documented now.
- Taxonomy confirmation:** Final sign-off that taxonomy (sections/sub-sections) is locked and will not change during migration.
- Evergreen vs. archive content:** Any content to exclude from migration (very old, low-quality, or duplicate).

### 2.2 — Design & Brand Assets

- Brand guidelines:** Logo files (SVG/PNG), color palette (hex codes), typography, spacing rules.
- Design mockups / references:** Any existing designs or competitor references the client wants to emulate.
- Favicon and app icons:** Favicon, Apple touch icons, PWA icons.
- Ad placeholder specs:** Standard ad unit sizes used on the site (e.g., 300x250, 728x90, 320x50, etc.).

## Monetization, SEO & Integrations

### 3.1 — Advertising & Monetization

All monetization details must be confirmed before the build team implements ad slots and revenue tooling.

Revenue Source	Active?	Details Needed
Direct-Sold Ads	Yes	Targeting parameters, ad sizes/types, roadblocks/takeovers, how campaigns are sold, sponsored content details.
Programmatic Display	Yes	Header bidding solution (Prebid, Amazon TAM, etc.), SSP list, floor prices.
Video Ads	Yes	Own video content? Player name & provider. SSAI or CSAI? In-stream ad types. Video hosting & transcription provider.
Sponsored Content	Yes	Sponsored article/category structure. Native ad labeling requirements.
Affiliate / eCommerce	TBD	Which affiliate services? (Amazon, CJ, etc.) Link format requirements.
Subscriptions	TBD	Provider (Memberful, Piano, etc.), existing subscriber list, entitlement rules.
Donations	TBD	Provider (e.g., Stripe, Donorbox). Placement and flow.
Newsletter	TBD	Current provider (Mailchimp, Klaviyo, etc.). Monetization via newsletter ads?

## 3.2 — Distribution Channels

Confirm which distribution channels are active and whether they need to be monetized.

- Apple News:** Active — confirm Apple News Publisher ID and whether monetization is enabled.
- MSN:** Active — confirm content feed and any revenue share arrangement.
- Yahoo:** Active — confirm syndication agreement details.
- Google News:** Confirm sitemap and Google News eligibility. Enable if not already.
- SmartNews / Flipboard / NewsBreak:** Confirm if any of these should be activated and provide RSS/feed URLs.

## 3.3 — Third-Party Integrations

- Newsletter provider:** Name (Mailchimp, Klaviyo, Sailthru, etc.) and API key / embed codes.
- Comments system:** Provider (Coral, Disqus, etc.) or custom — credentials and embed script.
- Analytics (additional):** Parse.ly, Marfeel, Chartbeat, or other data tools — confirm merge/integration strategy.

- AI integrations:** Any planned AI features on the backend — confirm scope and provider (OpenAI, etc.).
- Other integrations:** CRM, paywall, membership, push notifications (OneSignal, etc.), chat — list all.

### 3.4 — SEO & Technical Baseline

- Core Web Vitals baseline:** Provide current LCP / CLS / INP scores for Desktop and Mobile (from CrUX or PageSpeed Insights).
- Search Console:** Add RebelMouse team as a verified owner in Google Search Console.
- Sitemap:** Current sitemap URL and any custom sitemap requirements (news sitemap, video sitemap).
- AMP:** Confirm if AMP is required and whether AMP ads should be monetized.
- Structured data:** Any existing structured data (Article, BreadcrumbList, etc.) to preserve or add.

WEEK 4 · Days 25–32

## Pre-Launch QA, Training & Sign-Off

### 4.1 — QA & Testing

- Test URL:** RM provides staging URL — client reviews and provides written sign-off or feedback list.
- Acceptance criteria:** All scope items verified against the agreed acceptance criteria.
- Ads QA:** All ad units tested on desktop and mobile (direct-sold and programmatic). No broken or missing placements.
- Content check:** Spot-check migrated articles, gallery items, redirects, and contributor pages.
- Core Web Vitals re-check:** LCP / CLS / INP on staging should meet or beat the baseline provided in Week 3.
- Social meta / OG tags:** Open Graph and Twitter card tags verified for article and section pages.
- Newsletter opt-in:** Subscription forms and confirmation emails tested end-to-end.

### 4.2 — Training

- Editorial Editor Experience (EE) training call scheduled and completed.
- Ads / monetization training call scheduled and completed.
- SEO training call scheduled and completed.

- L&D (Learning & Development) additional training as agreed in scope.
- Client confirmed they have access to RebelMouse Help Center and documentation.

### 4.3 — Go-Live Checklist

- DNS cutover:** Client IT or OM confirms DNS changes. Propagation window acknowledged (up to 48 h).
- SSL certificate:** HTTPS verified on all domains and subdomains after cutover.
- Redirects live:** All 301 redirects from old URLs firing correctly.
- Analytics verified:** Page views appearing in GA / Parse.ly / Chartbeat on the new site.
- Take-live URL:** Final live URL documented in Jira and shared with all stakeholders.
- Monitoring set up:** Uptime monitoring and alert channels configured.

# Quick-Reference: Master Information Checklist

Use this table as a running tracker. Mark each item as received (✓) or still pending (△).

CONTACTS		
Item	What to Collect	Status ✓ / △
Technical POC	Name, email, Slack handle	
Editorial POC	Name, email, Slack handle	
Billing / Contract POC	Name, email	

ACCESS & CREDENTIALS		
Item	What to Collect	Status ✓ / △
Domain / DNS	Registrar + access or IT contact	
Current CMS	Login / API token for export	
Ad Server (GAM/DFP)	Account access confirmed	
CDN	Provider + account access	
Google Analytics	Admin access or read token	
Parse.ly / Chartbeat	API key or admin access	
Search Console	RM added as verified owner	
Social accounts	All handles confirmed	
OpenAI API key	If AI features in scope	
Vault access	Coordinated with Igor Demko	

CONTENT		
Item	What to Collect	Status ✓ / △
CMS export / data dump	Full content export file	
Content volume by type	Articles, galleries, photos, etc.	
Photo licensing	Getty / AP / owned credits mapped	
Authors / Contributors	Full list with bios	
URL structure & redirects	Current URL map + redirect list	
Taxonomy (final)	Locked section/sub-section list	

BRAND & DESIGN		
Item	What to Collect	Status ✓ / △
Brand guidelines	Logo, colors, fonts	
Mockups / References	Designs or competitor URLs	
Favicon / Icons	All sizes	

MONETIZATION		
Item	What to Collect	Status ✓ / ⚠
Direct-sold ad details	Sizes, targeting, takeovers	
Programmatic / header bidding	Prebid config, SSP list	
Video ads	Player, SSAI/CSAI, hosting	
Affiliate services	Provider(s) and link format	
Subscription / paywall	Provider, subscriber list	
Newsletter provider	Name + API key	
Comments provider	Name + embed script	

DISTRIBUTION		
Item	What to Collect	Status ✓ / ⚠
Apple News	Publisher ID + monetization status	
MSN	Feed + revenue share details	
Yahoo	Syndication agreement	
Google News	Sitemap verified	

SEO & PERFORMANCE		
Item	What to Collect	Status ✓ / ⚠
Core Web Vitals baseline	LCP/CLS/INP Desktop & Mobile	
Sitemap URLs	Main + news + video	
AMP scope	Confirmed yes/no	