AM - Manage ENT On-Boarding Projects Launch

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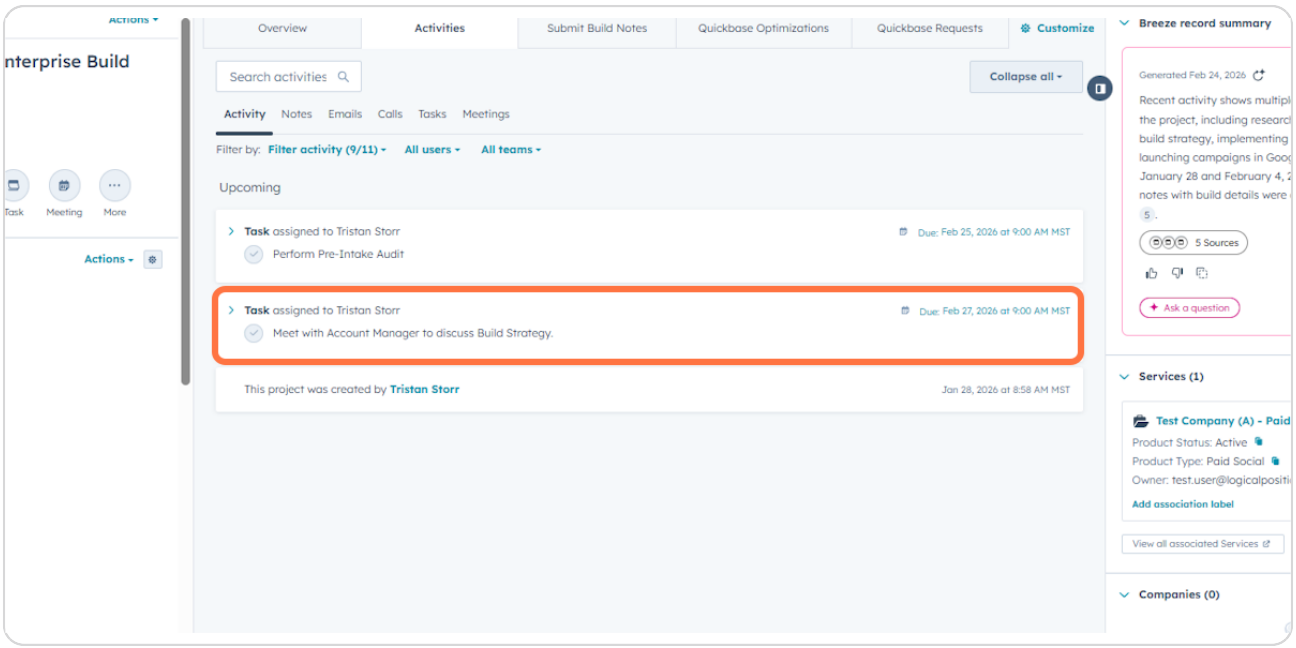
Created by	Creation Date	Last Updated
Logical Position	Feb 24, 2026	Feb 25, 2026

STEP 1

After Completing Post-Intake Meeting, PSS will mark "Meet With AM" Task As Completed

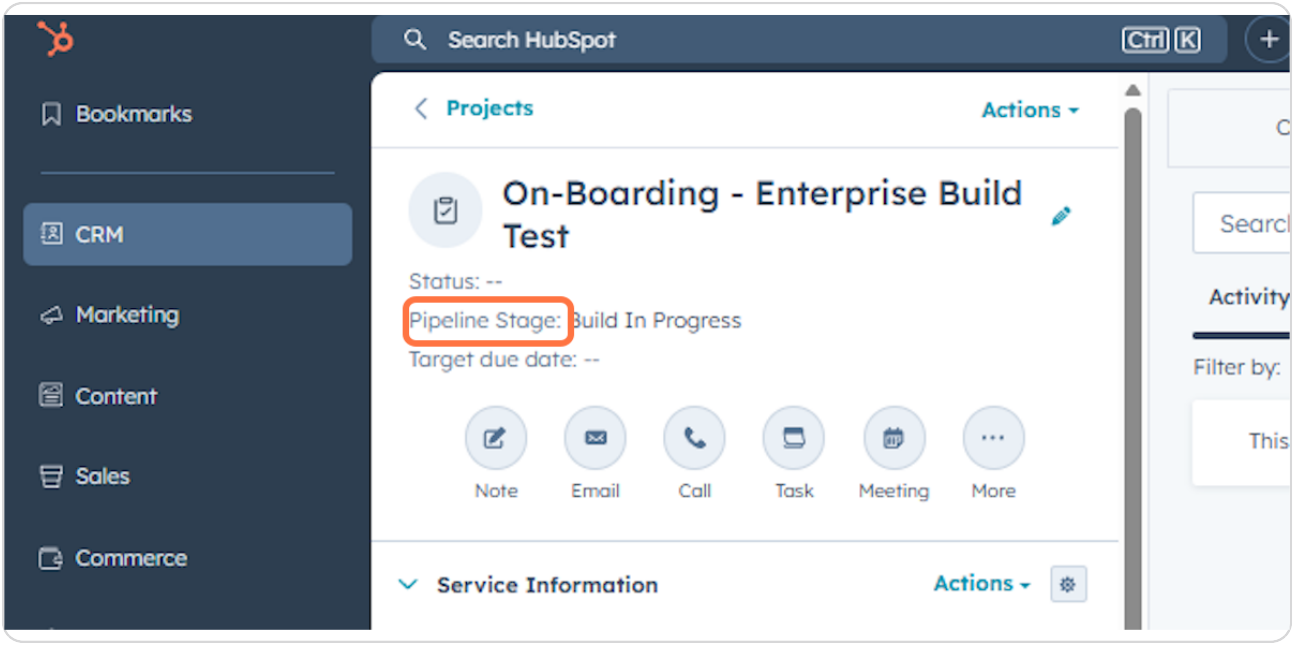
The PSS completing this task moves the Project into "Build In Progress"



STEP 2

On-Boarding Project Should Moves Build In Progress Stage

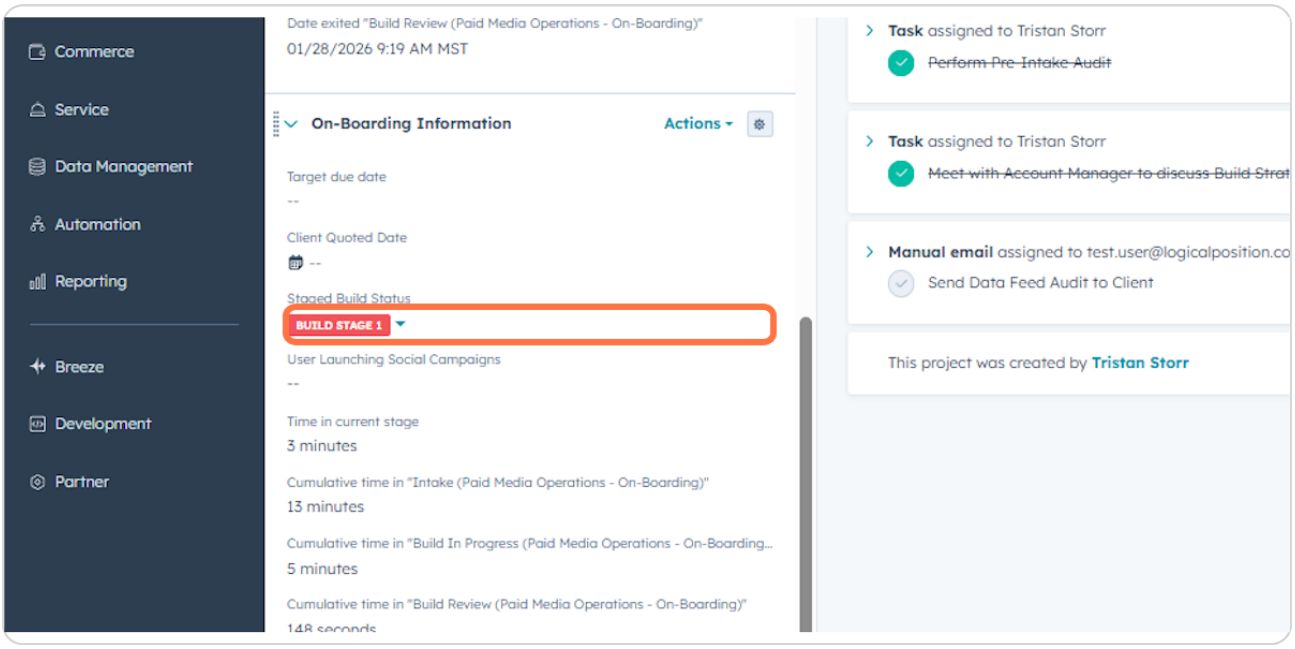
After the Intake is complete and the AM has met with the Specialist so that they can begin building, the Build In Progress stage will generate several new tasks. Most will be assigned to the Specialist for the Build Milestones, but a few will be assigned to the AM to manage during the build and launch period.



STEP 3

Staged Build Status on Project moves to "Build Stage 1"

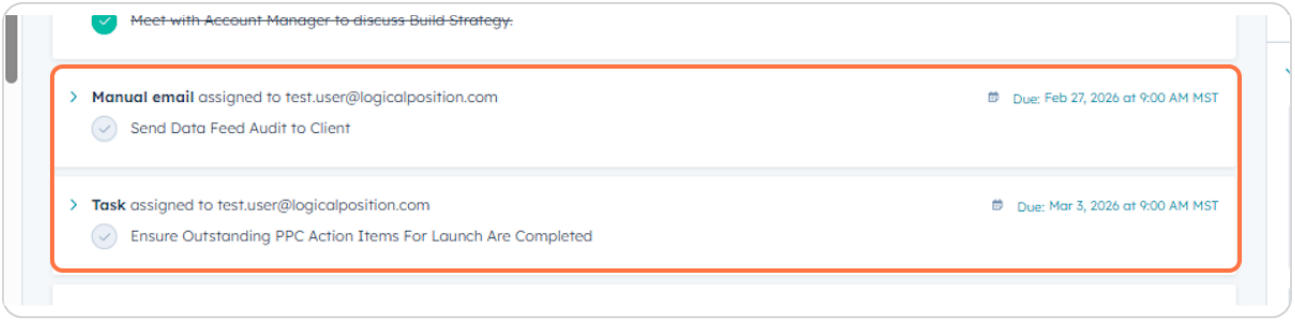
Staged Build Status field in the On-Boarding Information section of the project indicates where in the ENT Build Process the Specialist is.



STEP 4

New AM Tasks For Build Are Generated

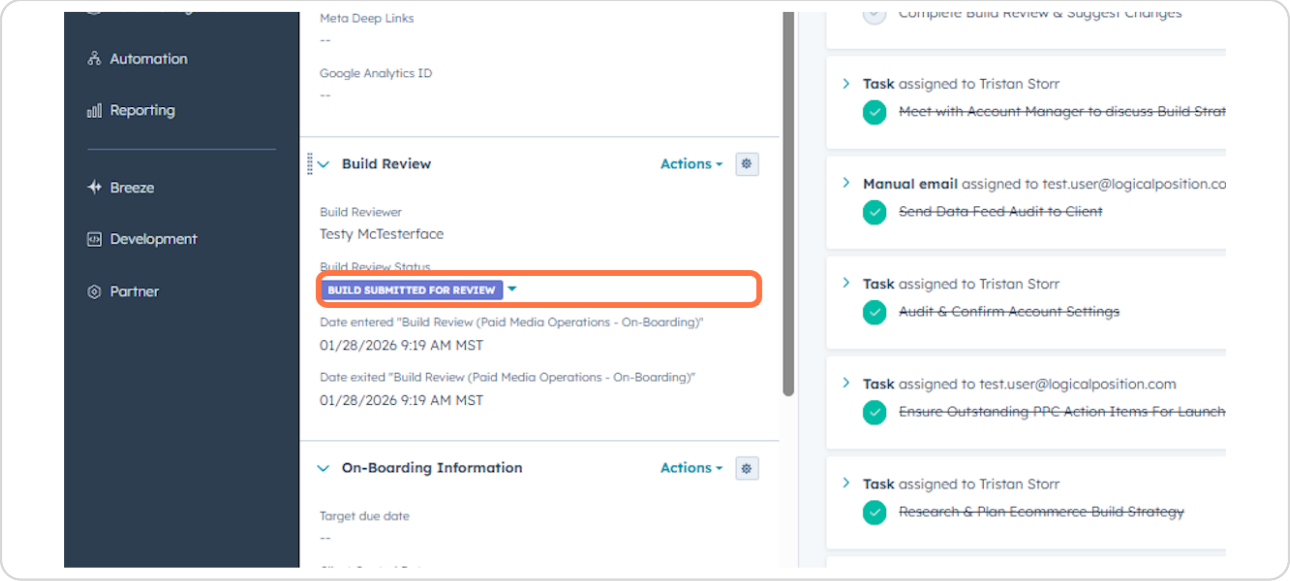
During the first Build Stage, tasks are generated for the AM. The number can be variable, based on product mix, but include tasks like "Ensure Action Items For Launch Are Complete" and "Sharing Data Feed Audit With Client".



STEP 5

Specialist Completes Campaign Set and Submits For Review

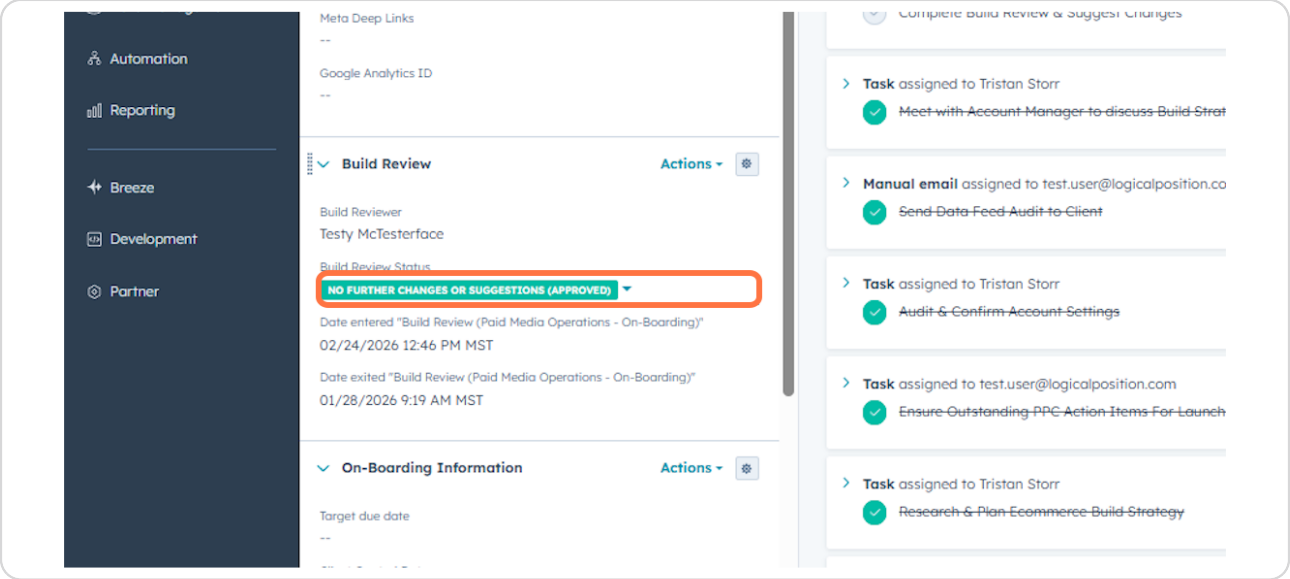
Once the PSS is done with their first set of campaigns, they will undergo the Build Review Process using the Build Review Status field. Project Stage moves to Build Review.



STEP 6

Specialist Team Lead Approves Build

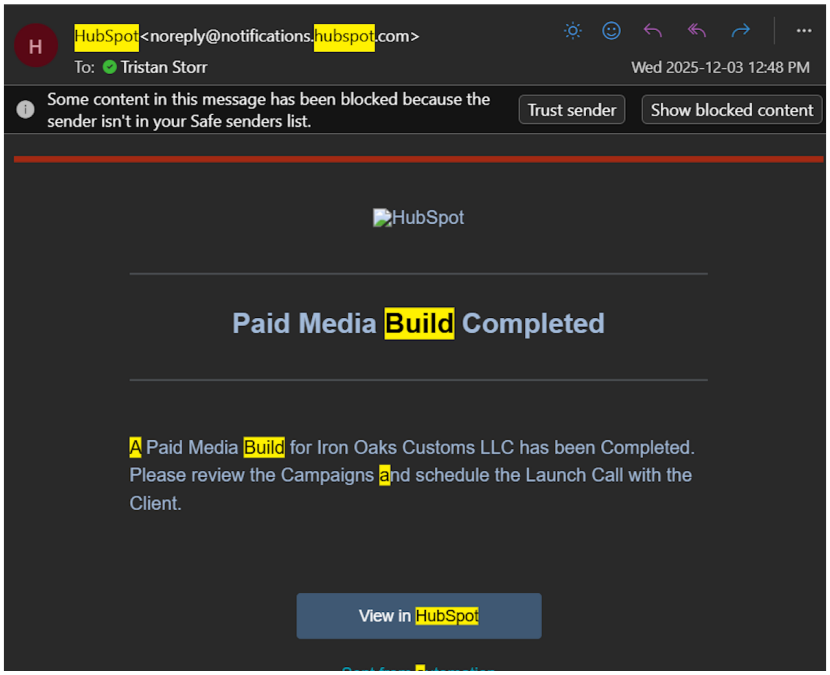
The Build Review process ends when the PSS Team Lead moves the Build Review Status field to an Approved status. This changes the Project stage to Build Completed.



STEP 7

AM Receives Email Notification of Campaign Set Completion

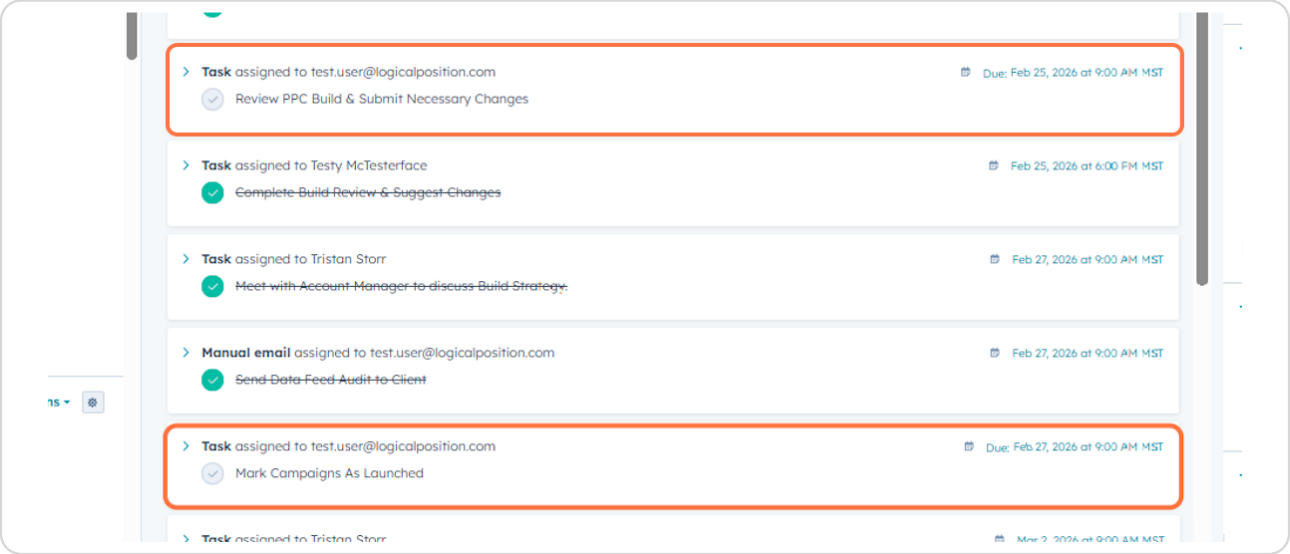
Via Email, an AM will receive a notification that a Campaign Set has been completed once the Project stage hits Build Completed.



STEP 8

AM Gets Two Launch Tasks Post-Build

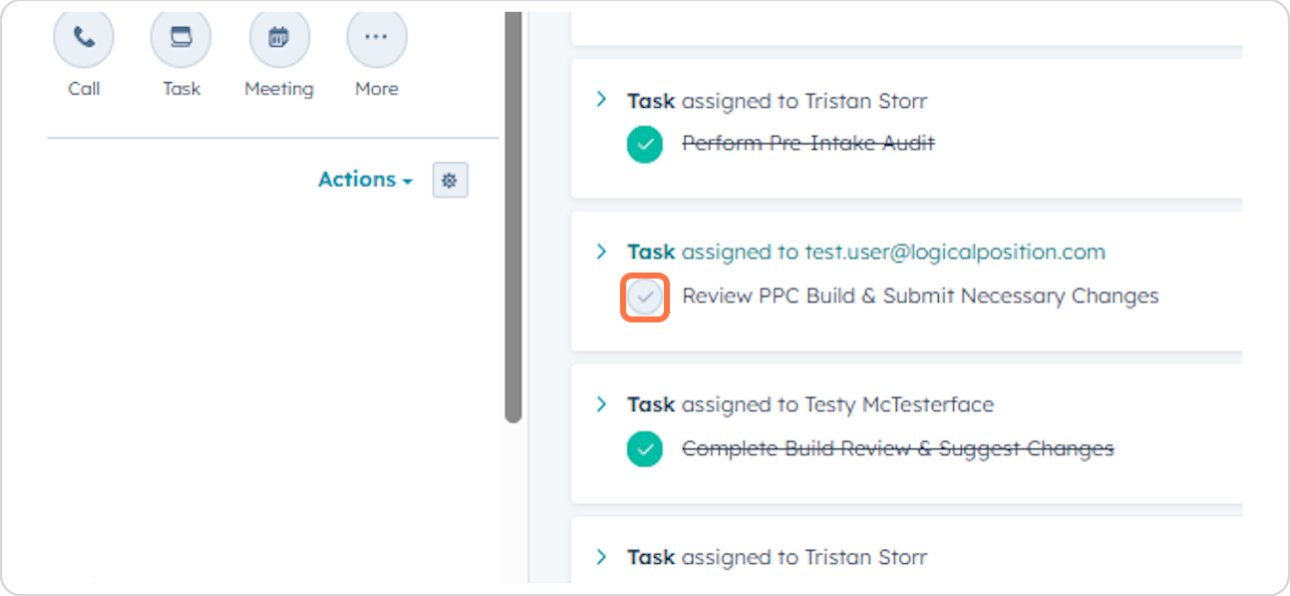
AM is assigned to two new post-build tasks: Review Build & Submit Changes and Mark Campaigns As Launched.



STEP 9

AM Reviews Campaigns For Accuracy Pre-Launch

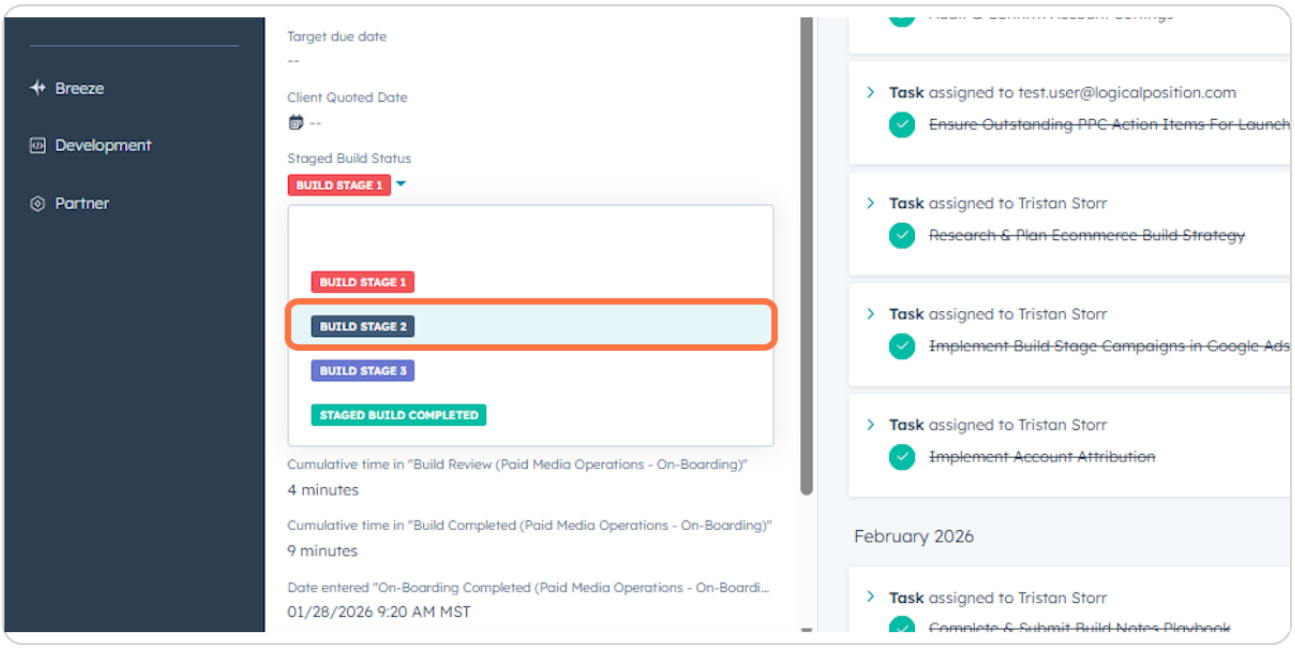
AM reviews the campaign set the PSS build and coordinates with them for any changes to be made prior to launching.



STEP 10

Specialist Moves To The Next Build Stage

Once the PSS is ready to move to the next Build Stage, they will manually update the Staged Build Status field on the Project to Build Stage 2.



STEP 11

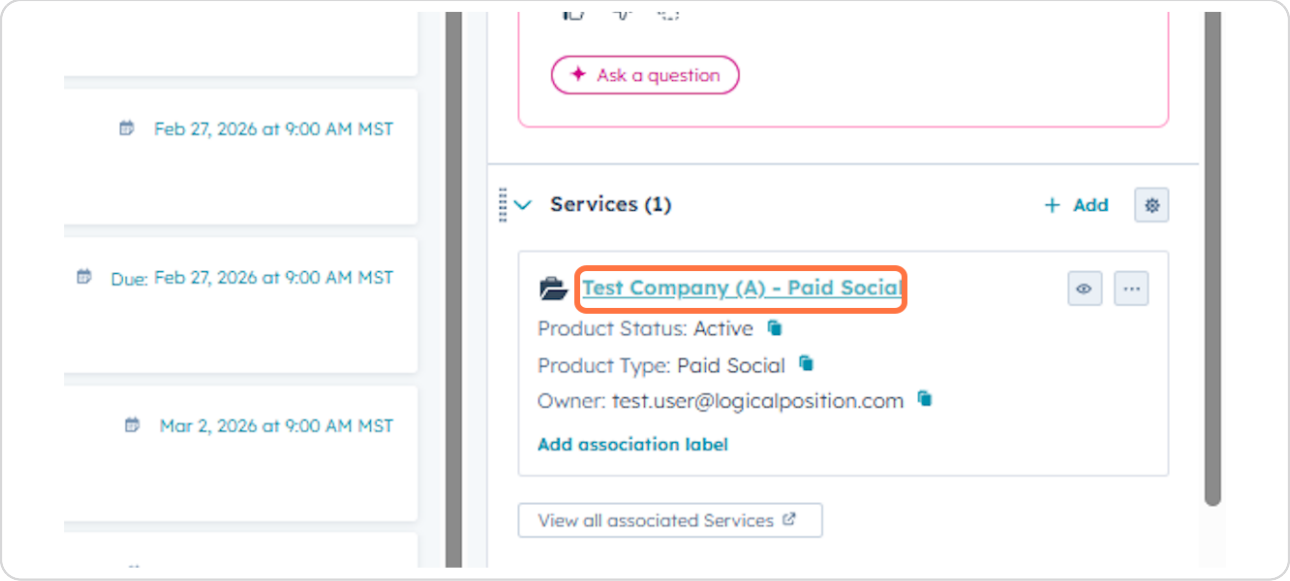
AM Performs Launch With Client

Once the AM has completed the scheduled launch call with the client, they will go through the process of marking the account as launched. This is the same action as marking Week 0 as complete in Quickbase.

STEP 12

AM Navigates To The Service

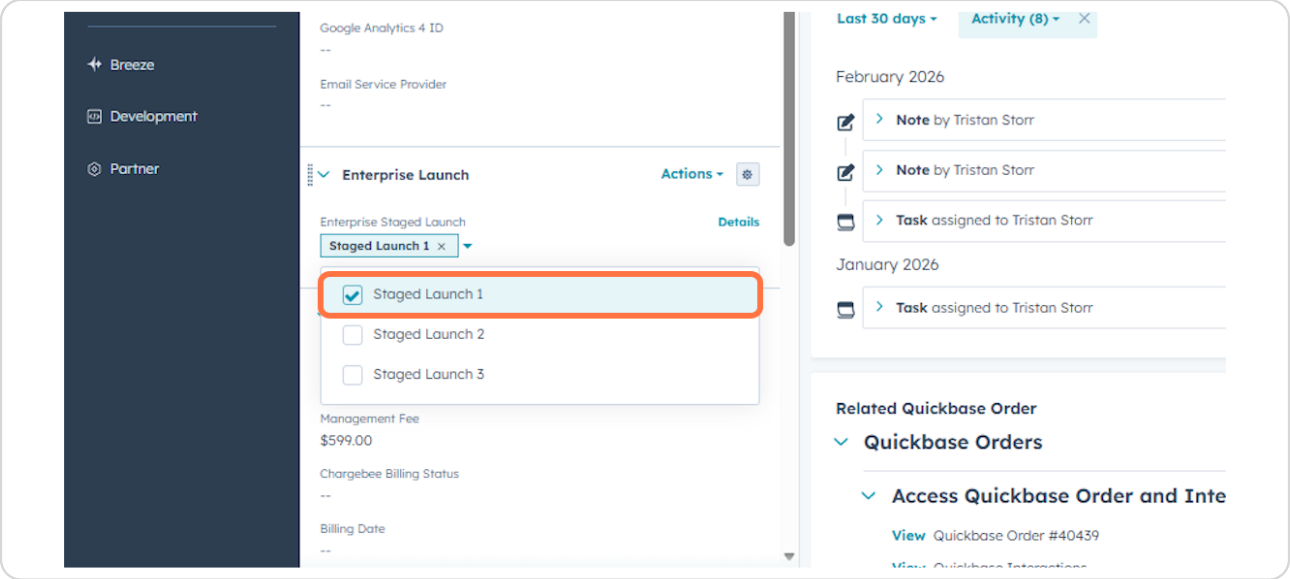
To mark the launch as complete for the first campaign set, the AM goes to the Service of the record of the subscription they just launched.



STEP 13

AM Updates "Enterprise Staged Launch" Property

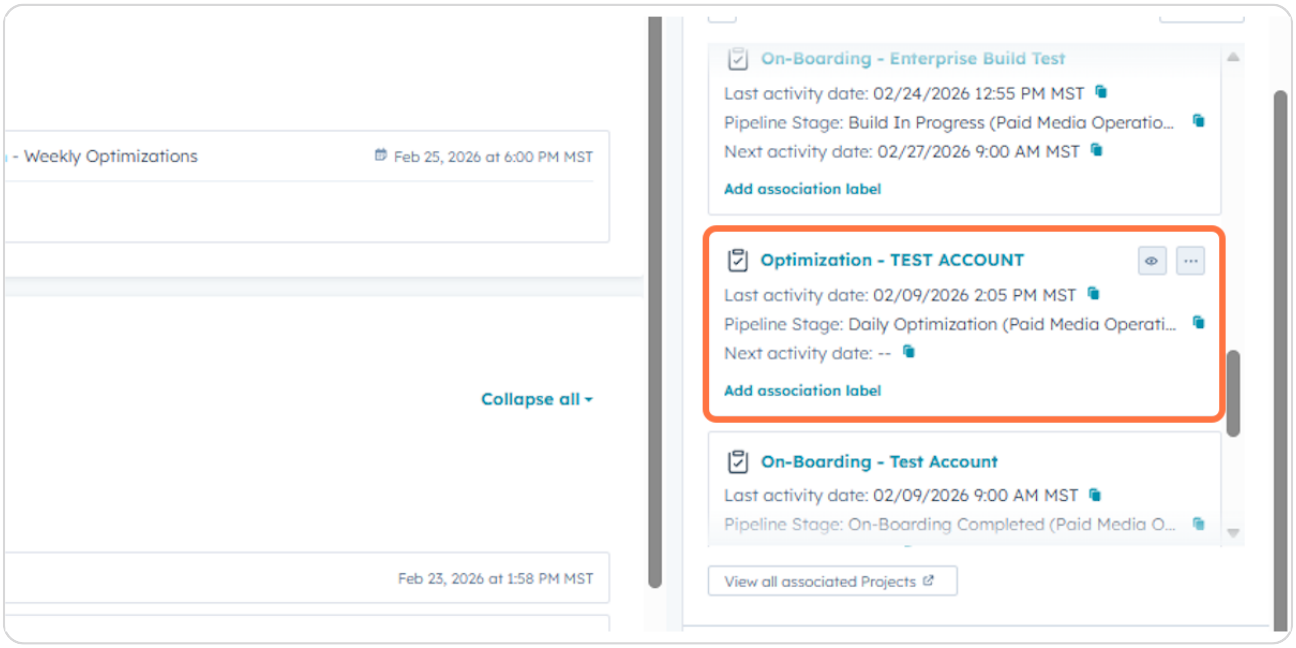
In the left-column of the record, in the Enterprise Launch property, the AM selects "Staged Launch 1" from the dropdown. This indicates that the first campaign set has been launched.



STEP 14

Optimization Project Generated

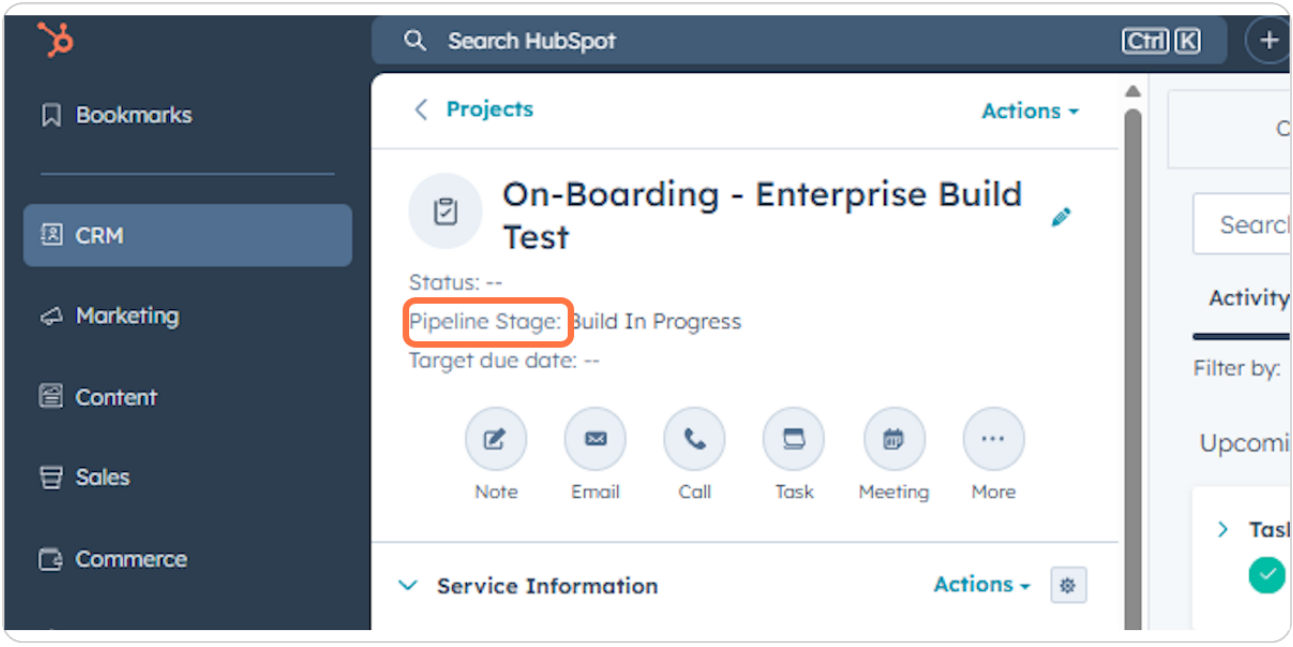
The action of updating the Enterprise Staged Launch property from *null* to Staged Launch 1 tells the Service to generate a new Optimization project for the Specialist. This is where the Specialist will perform their routine optimizations moving forward.



STEP 15

On-Boarding Project Stage Moves Back To Build In Progress

The On-Boarding Project moves back to Build In Progress as the Specialist starts building out the next campaign set for the client. The process above will repeat for each Campaign Set. AMs will continue to receive Email notifications when a Campaign Set is completed and reviewed. Subsequent tasks for reviewing campaigns and marking campaign set as launched on the Service will also generate.



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