

Launching a Membership Site Launch Checklists

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White Glove Web Training
Concierge Answers to Your Internet Questions



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<http://whiteglovewebtraining.com>*

Note that while these checklists came specifically from some medium sized membership website launches, they also apply to launching online learning platforms, courses, and other digital products.

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Membership Pre-Launch Testing

Testing before the launch is critical. Most developers test platforms themselves, but in cases like membership sites where others are going to be using the site, it's important to have each audience type test the platform for a successful launch.

Suggested Testing Timeframe?

Note that the site should be completed including content before this timeline starts.

- ◆ Week 1 - Client testing and training
- ◆ Week 2 - Soft testing launch with 10-20 dedicated people
- ◆ Weeks 3-4 - Beta launch up to 50 people - Testing Signup and Flow is Key

4 Key Testing Areas

When working through the above testing timeframe, there are four key

- ◆ Payment Gateway
- ◆ Testing Sign-up and sign-in
- ◆ Testing the membership levels
- ◆ Testing Email Integration

Payment Gateway Testing

This is an area where developers usually test, but it's not enough if you're going to hand the management process over to the client. In this case, the client also needs to test the payment gateway and needs to understand the flow of the process and the reports they receive.

Testing Sign-up and Sign-in

It is critical for those who will be managing the site and those who represent the target audience who will be signing up and using the membership. This is where you find what end users find difficult or confusing.

Membership Levels and Content

It's important to test that people are receiving the content they should see based on the membership level set. You want to make sure that people aren't seeing more than they should and also insure that they are not seeing too much.

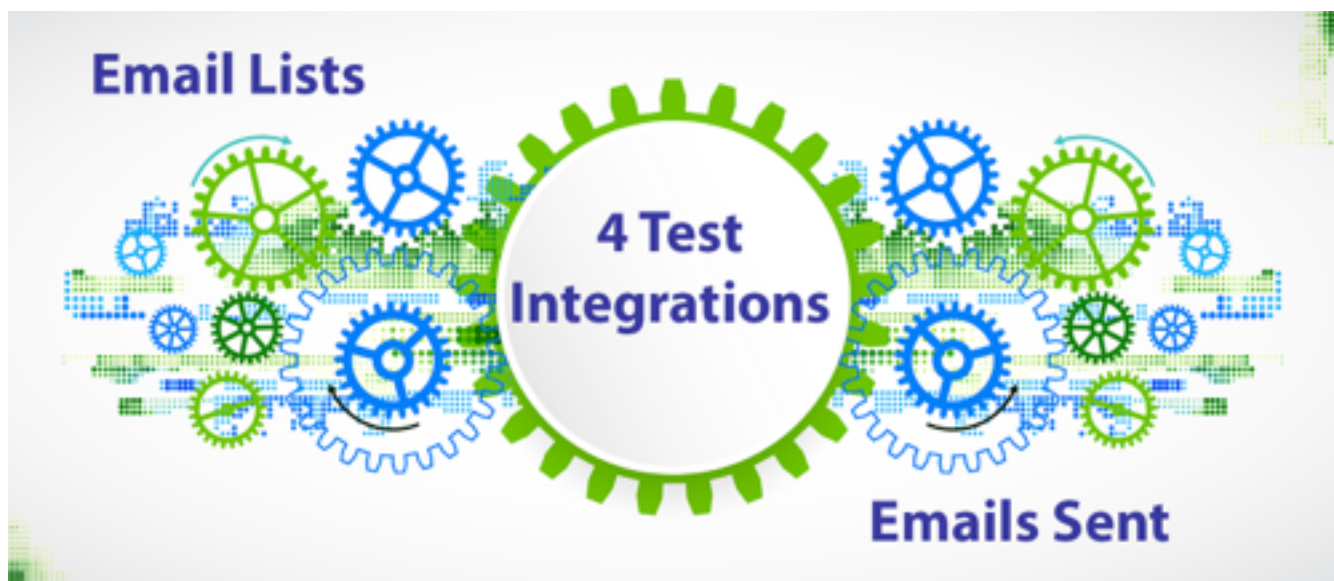
For each membership level, have people test logging in and see what content is available.

Check Redirects

It is common to configure membership sites to redirect a user to a specific page after login based on their membership level. If these are set, test that they are working.

Integrations

Test that your integrations are working. Integration with email lists is one of the most common forms of integration when creating membership sites.



One common scenario is to have a person put onto an email list specific to their membership level when they register. Make sure they are actually being added to the correct list.



Guidelines for Test Users

It is important to have all types of users test the site for the purposes they will be using the information. As a developer, you must test all of the technical pieces. Administrators and authors of content need to test the site from both their own perspective and from the viewpoint of their audience. People in your target audience should also be testers to make sure that their processes make sense for them.

Beta Program Testing Guide

Please test the following scenarios to make sure that they are working, and for ease of use.

Provide them test credit card numbers. These should be provided by your Payment Gateway. For example, you can find the Stripe Test Numbers at: <https://stripe.com/docs/testing#cards>

Break your testers into groups that match your membership levels.

Sample Instructions

In your browser, please visit: <https://yourdomain.com>

Select the Option to register as a Basic Member (note this will change based on your membership levels and the group they are in).

Please note any questions or difficulties you have during the

When you login, you should be redirected to this page. (List the URL and show a screen grab of the page.)

Please click on the following links. Write YES by the link if it takes you to a working page. Write NO by the link if it takes you to a page that says you don't have access to this content.

Give them links to any content you want them to test. If you have multiple levels, actually given have them test links to content they should not be able to access. Make sure they cannot access this.



Launch Checklist

Quick checklists can be used to help make sure a launch goes smoothly. These break down between technical items to check, customer support processes to make sure are working, and marketing efforts.

Technical Checklist

- ◆ Make the payment gateway live taking it from test. Test that it is working. I usually run 1-3 real transactions for testing.
- ◆ Double check that coupons are configured
- ◆ Turn off your Maintenance Plugin, if you have one

Customer Support Checklist

- ◆ Confirm that support processes have been identified and method of communication is prepared.
- ◆ Prepare communication for support methods and hours.
- ◆ Have required training created and presented for ease of customer use.
- ◆ Plan to have “all hands on deck” during the actual launch to help onboard customers.

Marketing Checklists

General Marketing

- ◆ Plan your marketing campaign
- ◆ Create collateral needed
- ◆ Implement advertising or email sends for the campaign

If Using a Webinar

- ◆ Run webinar test.
- ◆ Have launch webinar configured
- ◆ Test Internet upload speeds

- ◆ Test audio and video
- ◆ Confirm that all advertisements have run and marketing emails have been sent
- ◆ Monitor the webinar registrations

Email Campaign Post Sale Testing

- ◆ Create emails for the followup email campaign
- ◆ Test that all emails are triggered, sent, and received as planned

Next Steps

Are you interested in building your own Membership Website or Online Course, if so please sign up for more information at <https://whiteglovewebtraining.com/wcsac2017>



About Kim Shivler



Kim Shivler, M.Ed. has worked as a writer, instructor, developer and serial entrepreneur for over 20 years. Her business experience includes computer network and database administration, technical training and writing, project management, web development, and work as an aesthetician and spa owner. She also worked for large corporations including Tivoli, an IBM company, where she was part of the worldwide technical sales and marketing team.

Like her career, her writing has spanned a variety of fields including software documentation and instruction, manuals for aesthetic and medical devices, and general health articles. She has contributed to Livestrong.com magazine and other online publications.

She holds a Bachelor of Arts in English and Master of Education degree in secondary English education from the University of Florida.