**All Things needed for launch on 12/17** (if we need to push to 12/18 thats OK)

Questions that need answers:

* Email - Do we need to add in logo, color, aesthetic or just send as is? Is this a John Park question? NO
* Should the email out to the warm leads we mention the client profile? How will they know it’s not spam etc and need to fill it out? NO
* Should the acuity scheduler mention something about filling it out?
  + We are able to add a message to acuity, let me know if we add in the client portal link or if we will email people after they book? YES, add link
* Test the client profile portal? I can ask 5-10 ppl YES
* Pre session asset- is this emailed separately or is this housed in our client portal and how they will be notified to read it ? in client portal
* Summary from the session
  + Is this from Otter or Zoom and then put into the client portal?
  + How is this sent to the client?

[Email](https://docs.google.com/document/d/1DiyeSBSC4fFaYuMgob02Mk4XbwwMRgTyytexENPFE7k/edit?tab=t.0) - scheduled send on 12/18

* Email to be created in flodesk-
  + Heather to create on 12/13
    - Complete other then logo
* Video to be filmed and edited - check to see if it can be attached to email in flodesk
  + Heather film by 12/15
  + Gerard edit via an App or AI? By 12/16
* Zoom link and calendar invite created for 12/20 at 2pm (to be recorded and reshared)
  + Heather to add to Flodesk email 12/13
    - Complete
* Acuity link to be attached to email
  + Heather to add to Flodesk email 12/13
  + Heather to add early access promo code, $64 off
    - Complete
* Intake form attached to email
  + I[ntake form within the client portal-](https://docs.google.com/document/d/15tpjQyR3qsv4QX_bfYewZvsUtDV8jeFyQQCQWxZSLyY/edit?tab=t.0) Gerard
  + Do we add this in the email?
  + Heather to check if Acuity can link to client portal
    - yes, we can.

Pre session asset needs:

* [ChatGPT is complete](https://docs.google.com/document/d/1GL1DEsL-X7ze9Z-BT56qxkhi64f4yIV03MSrmgGtLd8/edit?tab=t.0) - how does this create what the client needs, and what I need. Where does it live?
* Pre Session Asset to be available before the session date
  + Heather to create asset
  + Gerard to create where it lives and how it is sent to client
* Pre session journal questions to be sent before the session date
  + Heather to create asset
  + Gerard to create where it lives and how it is sent to client

In-session needs:

* Client information from intake form
  + Gerard
* ChatGpt asset that was created using the intake form information
  + Gerard

Post-session needs:

* Summary from the session -
  + Gerard to set up AI
* Roadmap
  + ChatGPT prompt will create the roadmap and Heather can refine it