CFP Disclosures

Thursday, March 30, 2017 12:09 PM

If there is a CFP on the site, we must add the CFP disclosure to their bio, as well as add it to the about us page (confirmed with Tsvetelina Georgiev on 3/30/2017 @12:10pm)

RJA Group Names

Thursday, March 30, 2017 12:10 PM

We will need to ensure we are adding "Of Raymond James" to the RJA Group names.
(confirmed with Tsvetelina Georgiev on 3/30/2017 @12:10pm)

Previously we were instructed to not use this, this has been a change to our process.

Workflow (creation to cleanup)

Friday, June 23, 2017 9:23 AM

Labels for SC7 Board:
Custom Domain
Domain Resolving
Domain Masking (this should be rarely used, as I do not think that SC7 even supported this, but there could be one offs)
Awaiting Approval
On Hold
Need Layered Logo
Custom Content
Front Page Bio Image
Internal Transition
Bio Content Missing
Bio Photo Incompatible

Lanes for SC7 Board:
Ready to Build
Build in Progress
Ready for QC
QC Round 1
QC Round 2
Ready for Compliance
Compliance Review
Compliance Rejects
Domain Resolving (site that need additional steps most, if not all domain resolving sites will be IAD, they do not get reviewed by our compliance team)
Ready to Be Published
Publishing
Post Publishing Cleanup
Site Migration Completed
Site Cancelled

SC7 Weekly Schedule

Wednesday, July 05, 2017 1:14 PM

- Monday
  - Wrap up Post Publishing from Previous week
  - Site Builds
  - QC's
  - QC Corrections
  - Submit to Compliance
- Tuesday
  - Site Builds
  - QC's
  - QC Corrections
  - Submit To Compliance
- Wednesday
  - Site Builds
  - QC's
  - QC Corrections
  - Submit to Compliance
- Thursday
  - Publishing
- Friday
  - Post Publishing Cleanup

Build Processes

Thursday, October 06, 2016 9:23 AM

1. Create Site in Sitecore 8 Website Management:
    a. Sitename: Previous Sitename (all lower case)
        i. If they've requested a custom domain, contact Aaron Weiss.
    b. Template:

Form Selection	**SC8 Equivalent**
rj-th1-blue	Template 1 - Blue
rj-th1-burgundy	Template 1 - Burgundy
rj-th1-greygold	Template 1 - Grey/Gold
rj-th2-blue	Template 2 - Blue
rj-th2-burgundy	Template 2 - Burgundy
rj-th2-greygold	Template 2 - Grey/Gold
rj-th3-blue	Template 3 - Blue
rj-th3-burgundy	Template 3 - Burgundy
rj-th3-greygold	Template 3 - Grey/Gold

    c. Sitemap: RJ Blended
    d. Domain: www.raymondjames.com
    e. Set Pipeline
    f. Set Site Owner: Site Owner (primary advisor from form)
    g. Team Members: add any other people from the Site (the site owner should have checked: bio, delegate and workflow emails)
        i. Add any additional team members from the card
        ii. Primary Contact, if a team member is marked as primary content you should:
            1) Mark them as a delegate
            2) Change Main contact to them
    h. Address information: check 'Display' and 'Map' boxes
        i. Update Label of address:
            1) DBA or Primary Advisor Name
            2) Check each phone number to display
        ii. If there are additional address on SC7 site:
            1) Do these additional address appear within SC8?
                a) If so, then select them to be shown, if no address label, use the street name or city name with Office (IE Tampa Office, St Petersburg Office, Ulmerton Office)
                b) If no, then these address will not appear on the site until they are properly updated with registrations, this will take a service now ticket after the site has gone live
    i. Site settings:
        i. Group name: type if have a DBA, three lines max (check 'Display group name' box)
            1) RJA: include "Of Raymond James"
            2) Default to whatever title the site has on it (this could be a primary advisor name, or a location)
            3) If no DBA is listed on the form, or site, use primary advisor
        ii. Color Theme: Selection based on Form
        iii. Image Theme: Selection based on Form
            1) If set to "Use_Current" go through the site and determine was theme is being used, if multiple themes are being used, make a note of the most often used one
                a) If custom imagery is used, Label in trello and search ServiceNow and workamajig for these banners
                b) If unable to find custom banners, send the templated email to the advisor
        iv. Group Social Media
            1) Facebook, Twitter, Linkedin (we do not currently use youtube)
            2) Email Address is added on the SITENAME item from the content editor (this is either the primary advisor or the primary contact)
                a) This must be added for all sites
        v. Upload Group logo (if available): include Alt/Description, should be approved DBA or name of advisor
            1) All Logos should be transparent PNG's
            a. Check workamajig (use webadmin account, information here) for the source files
                a) First look up using Branch number:
                b) If you cannot find the logo via Branch number, look up site name, variations of the site name, partial site names, last name of the advisor, etc.
            b. Usually you can just use the png that's in the zip file, but some cases will require you to load the eps and make a new higher quality png file
                a) This will require you to load the file in Illustrator
                    i) File > Export As > PNG
                    ii) PNG Options: Resolution High (300 ppi), Anti Aliasing Type Optimized (Hinted)
            c. Check ServiceNow for tickets that have been entered
                a) Search by SiteName or Advisors name
    j. SAVE AND CONTINUE
2. Add Bios and Pictures to Team Members (As you begin gathering resources for this site, save all files used in This Location)
    a. Bio Image Requirements
        i. If photo is smaller than 206x248 **DO NOT** use it.
            1) Bio picture size: 206x248
            2) Filename: FirstnameLastname
            3) Alt/Description: *Name of Advisor* Bio Picture
        ii. Check Bio image sizes from SC7 Site
            1) right click bio image
            2) open image in new tab
            3) Remove parameters from url (everything after the file type, AKA query strings, etc)
                a) If this returns an image that is larger than the image that is shown on the SC7 site, use that image
                    i) You will have to do this to show the full image and be able to save down the correct file
                b) If the image is NOT larger than what is present on the site you will have to send out the email, we are no longer upscaling images to meet requirements.
        iii. Check ServiceNow for tickets that have been entered
            1) Search by SiteName or Advisors name
    b. Use standard html formatting for Bio

i. Clean up any invalid HTML by using an html cleaner like www.html-cleaner.com
   1) Do NOT leave invalid html in pages
   2) There should be no errant div tags inside bios unless they are absolutely required
ii. p, strong, em, ul, li
iii. Custom disclaimer, add it as a component, which will allow it to be used in multiple places
iv. Add team members to bio tile

c. Designations:
   i. If any CFP or other Professional Designations are present on the site you must add the content as outlined in Content Release 8/17/2017
   ii. CFP: you must add CFP disclaimer to the bio and to the about us page
d. For Home Office people:
   i. How to identify Home Office people:
      1) Strange titles (with consultant, etc)
      2) Branch ID of 5 numbers, etc.
   ii. Create a custom page:
      1) Custom Banner (heading, image)
      2) Rich Text Component method
         a) Manually add Home Office bio to this page, uncheck bio page from the main page and remove them from the bio tile
         b) Suggested HTML:
            i) Use "Fake Bio" from this location
      3) secondary Bio Tile method
         a) Create a new bio tile:
            i) Name: Our Partners
            ii) Select the people who should appear on this page
            iii) Ensure they are not set to appear in the other bio tile, and that they do not have bio turned on for them
            iv) Add this new bio tile to your custom page. This allow you to leverage their bio item but does not let you click on them to see a bio page, as the site was never intended to have two bio tiles, this one would display title, picture and the first designation

3. Homepage:
   a. Banner
      i. Create Custom Banner Component for home page
         1) Select Heading and content, leave image selection blank UNLESS they ask for a specific custom image different from the default theme
   b. Correct Niche Tiles - Select up to the first 8 client groups they select from the form
   c. Correct Category Tiles - all category tiles are set to default pages. These options are not presented to the advisor on the form, so these should be left to the default selection of:
      i. *Professional Expertise* links to > About Us page
      ii. *Breadth of Services_Blended* links to > Services/Services (If Advisor asks for Our Approach to be removed we typical will move the services under the main services drop down, which will require this tile to be edited, create a new tile, select all the same options as default, but make a custom link that points to the services page (not services/services)
      iii. *About Raymond James* to > About Raymond James
         1) If they request to have the About Raymond James page removed, then make a custom category tile collection, select "Professional Expertise, Breadth of Services_Blended and Accolades", make sure to change the default category tile on the home page to the new one you just made.
   d. Team Photo component
      i. If AWSM site does not contain a team image, you may skip this step
4. Remove optional pages
   a. Team recognition - If they have any content on your site about specific awards any team member has gotten, please use that content here. If they only include this information on their specific bio page, just keep it on their bio page and do not duplicate it on the 'Team Recognition' page
   b. In the community - migrate content if they have this page on their site
   c. Why work with a CFP - this page should remain if the site only has CFP designation
   d. Professional Recognitions - this page should remain if the site has more than just CFP
5. Remove additional pages as needed
   a. Services use: Selection based on Form
   b. Client Groups: Selection based on Form
6. Once site is built, it'll go through:
   a. Site QC Checklist (SC7)
   b. After QC, if marked for Preview, send out preview email
      i. If there are any corrections to be made and they are within scope, make the changes
         1) If they are out of scope, send the rebuttal email and forward the email chain to Jessica
   c. After Preview, send out to compliance
   d. Publishing Steps (SC7)

Custom Banners

Thursday, September 07, 2017 6:25 AM

When an advisor select's "Use_Current" on the form, we must match what theme they are using from the SC7 site, and identify any custom banners, additionally if we see any custom banners on a site where they didn't select "Use_Current" we should strive to migrate the custom banner.

We may also need to match specifically what image is used per page (this has been requested numerous times by advisors and may be the expected behavior when "Use_Current" is selected.

SC7 Spreadsheets

Wednesday, July 05, 2017 7:33 AM

SC7 Rollout Group Tacking sheet
This sheet should be used to verify and double check information about sites, you can find domain resolving site names on here.

SC7 Domain Migration tracking sheet
You will find additional information about custom domains on this sheet, you will need this sheet to proper update billing information for custom domains.

Searching ServiceNow and Banner Images

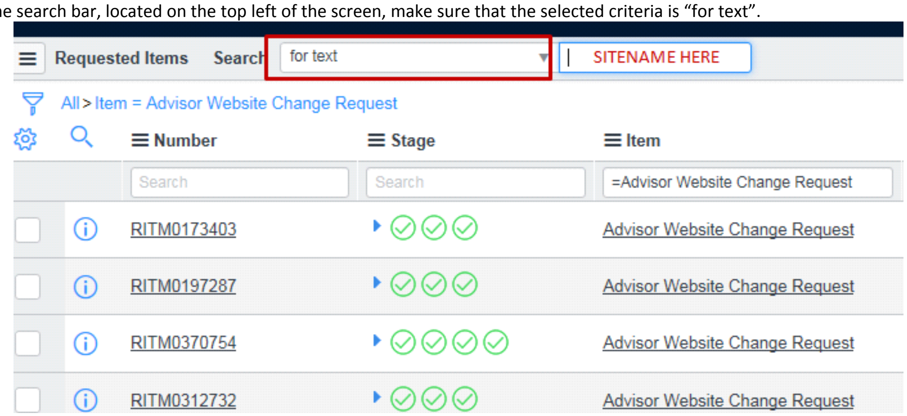
Wednesday, July 05, 2017 8:09 AM

Subject	**Migration Process: Searching ServiceNow and Banner Images**
From	Olivier Bizimungu
To	James Hood - Veredus; Dinesh Sharma; Kevin Bishop; John Atkinson; Monique Smith
Cc	Jennifer Schaefer
Sent	Tuesday, July 04, 2017 7:29 PM

Hello team,

I wanted to share some quick instructions that you can use to search ServiceNow for bio or banner images in the cases where the images on the current sites do not meet our requirements.

1) Access ServiceNow via this link. You should be sent to a page with all the past change request tickets populated.
2) In the search bar, located on the top left of the screen, make sure that the selected criteria is "for text".



3) In the following field, type in the sitename of the site you are looking for. **Sitename**.website.raymondjames or raymondjames.com/**sitename**
4) After the results are returned, open each ticket and browse the contents for the relevant materials (bio or banner images) that you're looking for. Please make sure that the returned request has a URL in the Website Address field that matches up with the sitename you entered. You have to be careful here as it could return results from other sites so this is a manual way of filtering those out.

Note: I recognize that if the ticket submitter uses a custom domain in the Website Address field that this method will likely not return a result. In these cases where nothing is returned and their custom domain doesn't have a keyword match with their sitename, please also perform a search for that custom domain as well.

5) If no results are returned, also **search the "General Services Resolved" folder in the WebSevices e-mail using the sitename again as the keyword.** Let me know if you need help with any of this.

REMINDER: We should only be sending out e-mails (bio or banner) only after the above two methods have been exhausted.

I've also crafted an e-mail that can be used to contact advisors with custom banner images that we can't find the full resolutions of.

Please let me know if you have any questions.

Thanks,

OLIVIER BIZIMUNGU
Senior Product Analyst

Raymond James Marketing
T 727.567.5353 // F 866.597.3988
880 Carillon Parkway, St. Petersburg, FL 33716

Searching Workamajig

Thursday, September 07, 2017 6:07 AM

1. Log in to workamajig
2. Click projects
3. Enter the branch number (starting with BR) in the client ID field
   a. The branch could have changed numbers from what was originally entered into workamajig, so you may need to search for names of sites, names of advisors on site, etc.
4. Click on project name field (do not need to type anything, hit enter)
5. Search through all project types for a specific branch looking for any project that could contain references to images, or references to purchased images
6. Note the project name, and Project number
7. Go to Agency Creative Files folder
   a. Look for the first 2 numbers of the project name (corresponds to year) then search within that folder for your project number, or the name of the site. This can narrow down what you are looking for. The images may be in a folder with a name that includes the project number, or they may just be in a folder marked "Rivertowne purchased images" (example)

Mapping Guide: Overall

Thursday, March 23, 2017 7:55 AM

Commonly Customized pages:

Who we serve
What We do
Our Process
Knowledge Center
Your Team
Home Page

Templated Email: Bio Image

Thursday, July 06, 2017 4:20 PM

Hello!

Thank you for submitting your website migration form. Our team has begun building your new website. Unfortunately, the bio images on your already-existing website are too small, therefore incompatible with the design of the new website templates. The minimum size requirement for these photos is **206Wx248L**. If you could find the original photos you had taken, those most likely will be larger than the files we have.

Portraiture.pdf

Please send us an original full-size bio image. If you choose to have a new bio photo captured, we have attached an optional guide that you can use to assist in the production of the new images.

If we do not hear from you for one week, we will continue without a bio image. Your new website can always be updated at any time following launch to include the images when they are ready.

Please reach out to Web Services with any questions or concerns.

Web Services
Raymond James Marketing
T 727.567.5423
880 Carillon Parkway, St. Petersburg, FL 33716
RAYMOND JAMES

Templated Email: Custom Banners

Thursday, July 06, 2017 4:19 PM

Hello!

Thank you for submitting your website migration form. Our team has begun building your new website. Unfortunately, the custom banner images on your pre-existing website are too small, therefore incompatible with the design of the new website templates. The minimum size requirement for these photos is **1920Wx1150L**. We are only contacting you because we have searched our past tickets and e-mails and could not find the full sized images. **Please send us the original full-size banner images so we can place them on your new website**.

Along with the images, we ask that you also supply us proof of ownership or purchase of the images, indicating that you are permitted to use the images. For more information on this requirement, visit our RJnet page.

Please reach out to Web Services with any questions or concerns.

Web Services
Raymond James Marketing
T 727.567.5423
880 Carillon Parkway, St. Petersburg, FL 33716
RAYMOND JAMES

Suggestions:

1. In each email to the advisor we should include a section with links showing them exactly what banner we are looking for, give them to links to the exact pages

Updates: Removed paragraph:

If we do not hear from you for one week, we will continue without the custom banner images. These will be replaced by images from the image set you elected when you filled out the website migration form. Your new website can always be updated at any time following launch to include the images when they are ready.

Templated Email: Logo

Thursday, July 06, 2017 4:20 PM

Hello!

Please send us the source files for your logo. We would like to ensure that your new migration has everything on it from your old site, but the logo files used on the old site are too highly compressed for us to use them on this site.

If we do not hear from you for one week, we will continue without your logo.

Please reach out to Web Services with any questions or concerns.

Web Services
Raymond James Marketing
T 727.567.5423
880 Carillon Parkway, St. Petersburg, FL 33716
RAYMOND JAMES

Templated Email: Preview

Thursday, August 31, 2017 7:40 AM

Good [Morning, Afternoon] [FA Name],

Your updated website is ready to preview and can be accessed at the link below.

Website Link

Due to the large number of websites being updated by the team, this preview step is only intended to give you a chance to preview the site and *identify missing or incorrect information*. This step is **NOT** intended for major revisions to the site, which can be made after the website is published.

If you do notice missing or incorrect information, please provide a link so we can remediate as soon as possible.

Please respond to this e-mail with an acknowledgement by **xx/xx/2017**.

If we do not receive an acknowledgement by that date, we will move forward with the website.

For more information, visit our RJnet page or contact our Website Services team at x75423 or via e-mail WebServices@raymondjames.com

WEB SERVICES
Raymond James Marketing
T 727.567.5423
880 Carillon Parkway, St. Petersburg, FL 33716

RAYMOND JAMES

Templated Email: Preview Rebuttal (Out of Scope)

Thursday, August 31, 2017 7:40 AM

Hi [FA Name]

Yes, you can make [**Insert the EDIT Requested**] but that is outside of our migration process. This preview stage is only intended to identify incorrect or missing information. You will receive an e-mail notification when your website is posted and at that point you can make revisions and modifications to the site.

You can visit our RJnet page to see which changes you will be able to make yourself using the new website authoring tool, once the site is published. For more complex changes that our self-authoring tool does not support, you will need to complete the Advisor Website Change Request Form in ServiceNow (**ServiceNow** > **Order Something** > **Other** > **Advisor Website Change Request**).

In the meantime, we will move forward with migrating your website.

WEB SERVICES
Raymond James Marketing
T 727.567.5423
880 Carillon Parkway, St. Petersburg, FL 33716

RAYMOND JAMES

Templated Email: Rebuttal (missing/incorrect content)

Thursday, August 31, 2017 7:42 AM

Hi [FA Name]

Thank you for making us aware of this error. We will correct it and move forward with publishing your website.

Additional Information

You can visit our RJnet page to see which changes you will be able to make yourself using the new website authoring tool, once the site is published. For more complex changes that our self-authoring tool does not support, you will need to complete the Advisor Website Change Request Form in ServiceNow (**ServiceNow** > **Order Something** > **Other** > **Advisor Website Change Request**).

WEB SERVICES
Raymond James Marketing
T 727.567.5423
880 Carillon Parkway, St. Petersburg, FL 33716

Domain Resolving

Wednesday, July 05, 2017 9:01 AM

More than just IAD sites can be domain resolving on SC7, IAD sites will be domain resolving, and will not go through our normal compliance workflow. RJFS sites that are domain resolving will still go through our normal workflow

Should I migrate content?

Friday, June 30, 2017 11:30 AM

1. Is the content present in the normal SC7 sites (check SC7 Sample Layouts) ?
   a. If Yes, Content is in the normal sites
      i. Is the content something that the advisor expanded on greatly and seems to be specialized in?
         1) If Yes, then migrate the content
      ii. Is the content completely canned
         1) If Yes, do not migrate
   b. If No, Content is not in the normal site:
      i. Is the content covered in SC8 by another topic?
         1) If yes, do not migrate
         2) If No, discuss with Olivier

Sample Layouts

Thursday, June 29, 2017 11:21 AM

Sample Layout 1
https://samplelayout1.website.raymondjames.com/

Sample Layout 2
https://samplelayout2.website.raymondjames.com/

Sample Layout 3
https://samplelayout3.website.raymondjames.com/

Sample Layout 4
https://samplelayout4.website.raymondjames.com/

Sample Layout 5
https://samplelayout5.website.raymondjames.com/

Home Page Topics

Monday, May 15, 2017 7:57 AM

This is presented as what was selected on the form, generally these will be the headlines on the page

1. **A certification of skill – a commitment to serve**

   When planning your financial future, many details regarding your money and your life's goals must be addressed. With so much at stake, why not look to a CERTIFIED FINANCIAL PLANNER™ professional who is held to the highest ethical and professional standards in the industry? One who you can be confident has the education and experience to assist you with your complex financial needs and offer you sound, unbiased advice as you best plan for the future?

   When working with me, you and your needs are the focus of the financial planning relationship; they are what drive my recommendations for managing your wealth. And as a CFP® professional, I am committed to providing personalized, objective advice as you pursue your financial goals.

2. **Pursuing your financial goals with experienced guidance**

   Along with challenges, the market also brings new opportunities – you just have to know where to look and when to take action. Over the years, I've helped clients navigate through challenging times with purpose and confidence toward their financial goals, and I'm here to help you, too.

   Backed by the strength and resources of Raymond James – one of the country's leading independent financial firms – I can offer you an array of personalized financial services, support and guidance that can help make a positive difference in the pursuit of your unique financial goals.

3. **Personalized planning for your financial goals**

   Your financial goals, aspirations and investment needs are just that – yours. And your financial plan should reflect that. So rather than ask you to settle for an off-the-shelf investment program, our team is here to provide you with personalized financial planning based on your goals, your time frame and your particular tolerance for risk.

   We can provide you with just the right combination of financial services, support and guidance that makes the most sense for you. And should something change, we'll also be there to help keep you on track in the pursuit of your personal financial goals.

4. **Invest with experienced guidance**

   Preserving capital and managing risk are two important objectives for investors, and in today's global economy, they can be more challenging than ever. Over the years, we've had the privilege of helping clients manage the complexities of their wealth through carefully constructed portfolios and a strategic combination of traditional investment solutions and more sophisticated investment alternatives.

   Backed by the strength and resources of Raymond James, our advisors can offer you an array of personalized investment services, support and guidance that can help make a positive difference as you pursue your financial goals.

5. **Experienced guidance – more confident investing**

   When you're backed by experienced investment managers able to simplify the complexities of your wealth, you'll find that it can also help simplify your life. Through a disciplined process and investment choices based on your goals, time frame and risk tolerance, we can help not only reduce the many questions that can come with investing, but can also help you identify many opportunities as well – all in an effort to help make your life easier.

   Our team can provide you with investment services and guidance that make the most sense for you and your family. We'll also be there to help you each step of the way as you pursue your personal financial goals.

6. **A personalized approach to managing wealth**

   Managing wealth with an eye toward the future demands vigilance and skill in today's global economy. Over the years, I've worked with clients and their other professional advisors – including attorneys and accountants – to create comprehensive wealth management plans designed to make the best use of their wealth today, and to help ensure its endurance for future generations. I'll do the same for you.

   I can offer you an array of personalized services, support and guidance that can help make a positive difference in the pursuit of your financial goals.

7. Custom
   a. If they mention their firm name, their DBA, their specific location, or their specific name, that's one way to know its custom.

Client Types

Monday, May 15, 2017 7:59 AM

These were the client types as presented in SC7, if the site has any other client types, they are probably custom and should be evaluated to see if they match a client type from SC8 or if it's a new client type, we would only consider migrating content from these 5 types if the content is completely customized on the SC7 site, AND if the content was drastically different from the content in SC8. In all cases this should be a discussion with Olivier.

1. Retirees
2. Healthcare professionals
3. Women
4. Business owners
5. Corporate executives

Services

Monday, May 15, 2017 8:06 AM

Some of these will be under the "Planning for Life" header in the menu. It is very possible that a page will have custom services. You need to read through the service to find out if it is truly a custom service, or is represented by something else on SC8. Do not migrate these service pages without good reason (examples, CFDA with a heavy emphasis on divorce content)

1. Transitioning to retirement
2. Death of a loved one
3. Divorce
4. Career change
5. Selling a business
6. Investing in education
7. Retirement planning
8. Estate and charitable planning
9. Investment management
10. Cash management and borrowing
11. Business planning
12. Risk management
13. Fixed Income Bond Solutions
14. Institutional Consulting Services

These should already have equivalents, however there are some pages that were not converted into SC8, although there may be additional hold over pages from AWSM that were converted into SC7, see AWSM Mapping Guide: Services Page

Page: Who We Serve

Wednesday, June 28, 2017 10:05 AM

1. Invest in yourself. Invest in your future.

   If you're like us, you're a planner. You're not content with the status quo. You're striving to make the most of what you have – now and in the future. Whether you're just starting out, building a business or nearing retirement, you probably have a clear vision of what you want. You may be less sure of how to get there. That's where we come in.

   We've worked with clients from all backgrounds, and we understand the challenges you face and the values you want to protect. And while each of our clients may be different, there's one thing you all have in common: The need for a lifelong financial plan designed to help you create the life you want for today, tomorrow and whatever comes next.

Page: What We Do

Monday, May 15, 2017 8:02 AM

1. **Planning from an objective point of view**

    As professionals dedicated to continuing education and a high standard of ethics, we leave little to chance. We coordinate with other trusted professionals to ensure seamless management of your assets with services that range from portfolio and risk management, insurance and tax planning to estate and retirement planning and more.

    The result is a custom plan that has the underpinnings of knowledge required to carry it forward, a plan that is thoroughly researched and vetted, yet flexible and responsive to your needs and wishes.

2. **Guidance for every stage and phase**

    You're true to yourself, and your financial plan should be, too. That's the core of what we do. Backed by the resources of Raymond James, one of the leading independent financial services companies in the United States, our advisors take a different approach to financial planning that focuses on you as an individual.

    Our services are comprehensive and cover all phases of life, from planning for your children's education to honing in on a comfortable retirement. Whatever the milestone may be, we'll be there to serve alongside you.

3. **Streamlined solutions for a lifetime of needs**

    Making complicated matters simple. That is our ultimate goal, the mission that drives us. Bringing clarity and vision to all the financial decisions in your life is what we do.

    Whether you're focused on retiring on your own terms or leaving something behind for the next generation, we can help. Our sound, straightforward process leads to practical recommendations designed just for you.

    To help you find the straightest line to achieving your goals, our advisors offer an array of financial planning and investment services. So whatever phase of life you're in – whatever complexities you may face – our experienced professionals are equipped to guide you.

4. **A refined perspective on money management**

    Our team is driven to do what is best for our clients, seeking the highest possible performance for an acceptable level of risk. We strive to do that by offering investors a results-oriented approach to professional money management that employs a variety of investment vehicles and strategies.

    We also conduct thorough due diligence, research and analysis for every investment we recommend. That in-depth work allows us to offer you guidance that's proactive instead of reactive and helps us ensure that each selection works with the rest of your portfolio.

    But we're not all about the numbers. By providing service that's personal and responsive, we aim to build a relationship with you for the long term. We work closely with CPAs, attorneys and other professionals to ensure our planning fully aligns with your needs, now and in the future. Our services include building and monitoring custom investment portfolios and retirement and estate planning, as well as charitable giving and more.

5. **Truly integrated wealth management**

    The complexities that come with significant wealth call for experienced guidance that frees you from the time-consuming day-to-day management of your investments. Working closely with wealth managers – professionals experienced in serving distinctive individuals, families and businesses – enables you to spend your time and energy where it matters most.

    We tailor our full range of wealth management services to wherever you are in life and whatever you hope to achieve at each stage. Our detailed and time-tested process provides a holistic approach to custom financial planning. We also go to great lengths to provide the other services you'll need, including everything from thorough research and due-diligence to estate and legacy planning.

    As your financial stewards, our professionals coordinate with your other trusted advisors to get a detailed look at every aspect of your life to ensure a holistic approach to serving you.

6. Custom
    a. If they mention their firm name, their DBA, their specific location, or their specific name, that's one way to know its custom.

Page: Our Process

Wednesday, July 05, 2017 10:52 AM

1. Our Process

   We're all about you.

   When it comes to financial planning, there is only one person that matters: You. Because this is your life, your goals, your dreams. That's why we focus on financial planning for your whole life – from your first job to your last and beyond.

   As the driving force behind the process, you'll have a better idea of where you stand, where you're going and how you'll get there. In fact, the more engaged you are, the better the chances that you will be able to create – and fund – the life you've always wanted. And we're here to help keep everything on track. Together, we can help you bring your vision for the future into sharp focus so you can begin to prepare for it.

   Let's build a financial plan that puts you at the center of it, one that takes you from today to tomorrow, pausing now and ag ain to enjoy life's great moments along the way. While our planning process can be divided into four steps, it really is an ongoing endeavor that evolves as your life does.

   Here's how it works:

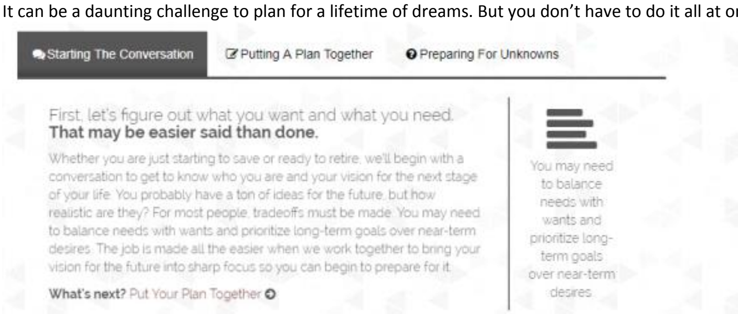
2. Our Process - GPM

   We're all about you.

   When it comes to financial planning, there is only one person that matters: You. Because this is your life, your goals, your dreams. It's not just about saving for retirement or paying for a child's education. It's about having the resources and the time to accomplish all your long -term goals, and still enjoy life's great moments along the way.

   It starts with knowing where you want to go, then figuring out how to get there. That's where we come in, as a partner to hel p you prepare for the future you've always wanted. We can help you identify and prioritize your goals and devise a plan to reach them. We'll work closely with other professionals and those who matter most to you to give you the best possible chance of achieving the life you've envisioned.

   It can be a daunting challenge to plan for a lifetime of dreams. But you don't have to do it all at once and you don't have t o do it alone. Here's how we can help:

Page: Your Team

Wednesday, June 28, 2017 9:55 AM

There are two types of canned Team pages from SC7 (typically)

Normal:
We take a team approach to financial planning, offering you a broader scope of expertise than you will likely find in any one person. Clients are our main priority, which is why we work to understand your unique circumstances and ultimately create a distinctive plan that provides a road map for your financial journey. By relying on the expertise of our team, we'll help you take a conservative approach to growing and preserving your wealth.

One Man Show: (Usually used on single advisor sites)
My passion for financial planning and commitment to excellence enables me to provide those I serve with sound financial wisdom and guidance. Clients are my priority, which is why I work to understand your unique circumstances and ultimately create a distinctive plan that provides a road map for your financial journey. Through my wide range of expertise and experience, I'll help you take a conservative approach to growing and preserving your wealth.

Page: About Raymond James

Monday, May 15, 2017 8:12 AM

These were the options available on the form for the About Raymond James page. We are not converting these, as they have newer options in SC8, however these are here so that you know what the options were to begin with. We would default to the form itself.

1. General / History of the firm
2. Core values / conservatism
3. Community involvement
4. Strength of Raymond James
5. Relationship with the firm / dedicated partner

Page: Community Involvement

Monday, May 15, 2017 7:53 AM

This page will map to the "In the Community" page in SC8

Page: Client Center

Friday, June 23, 2017 9:51 AM

This is a main item on the navigation of some sites that can include:

Events
Community Involvement information
Images Galleries
Custom Articles written as pages
Custom Pages

Page: News and Events

Thursday, September 28, 2017 2:22 PM

If a News and Events/Events page is on the SC7 site, it should be migrated to the SC8 site.

If the events are older than a year, add the events to the page under a header of "Past Events", then add a header for Upcoming Events (if they have no upcoming events add: Check back for Upcoming events)

1. Create events page
2. Create Banner
3. If there is opening text on the page, use that for the intro text
4. Add Rich Text Component for Past Events (if on the site)
5. Add Rich Text Component for Upcoming Events (if on site)

Page: Knowledge Center

Monday, May 15, 2017 8:27 AM

This page will mostly contain canned content: Typically non canned content will appear in side bars.

1. **Up to 3 canned newsletters:** Financial Journeys, Successful Women, and Small Business Dimensions
2. **Additional Links** (do not migrate)
3. **Extra Links** (could be added to Additional Links, or as a new section) (do not migrate)
4. **Custom Newsletters: Migrate**
5. **Other Articles on site: Evaluate then migrate**
6. **Financial Calculators** (do not migrate)
7. **3 Sections of articles:** Investing Well, Planning Well and Living Well (these are already in the SC8 Resources)

Additional Links

Monday, May 15, 2017 8:26 AM

Additional Links sometimes is used to store PDF's that an advisor has created, you will need to check the additional links section to ensure that you do not miss any advisor created PDF's

Calculators

Wednesday, June 28, 2017 11:38 AM

We are not migrating this content, there is nothing in SC8 currently that is like this

Custom Newsletters and other PDF items

Thursday, September 14, 2017 3:28 PM

These should be created on a custom page, as a sub menu under Resources

Name Formats

Thursday, September 14, 2017 3:28 PM

The form should always contain the most up to date information about an advisors name formats and titles. There will be times when information may not be present on a form and we will need to include information from the site as well.

If an advisor has his informal name on the form, use it.
If an advisor is using his middle initial on the form, use it.

Title Formats

Thursday, September 14, 2017 3:30 PM

Compliance would prefer that "Financial Advisor" always be first, or other RJ titles, however if an advisor pushes back during the preview process, this can be changed to meet their preference.

Process - Site QC

Thursday, October 13, 2016 12:24 PM

	PROCESS MANAGEMENT
	☐ The sites' Trello card should be in the 'Ready to QC' lane
	WEBSITE MANAGEMENT - WEBSITE SETUP
	☐ Site type - advisor ☐ Layout - Selection from Form ☐ Color - Selection from Form ☐ Site map - RJ Blended ☐ Domain - Selection from Form ☐ Site name - matches selection form/previous site name exactly (all lowercase) ☐ Pipeline Selection: SC7 Migration
	WEBSITE MANAGEMENT - SITE INFORMATION
	☐ Website owner (Selection from form) ☐ Branch - automatically pulls from CSS
	WEBSITE MANAGEMENT - TEAM INFORMATION

	☐ Display order matches old site
	    ☐ Bio page box checked if they are to have a bio page
	    ☐ Delegates checked - Selection from Form
	    ☐ Primary Contact Selected (Site Owner, or who is selected on the form)

	WEBSITE MANAGEMENT - ADDRESS INFORMATION
	☐ Addresses pulled from CSS ☐ Whichever address appear on site should pull from CSS, no manual address. ☐ Display check box is checked ☐ Map checked box is checked
	WEBSITE MANAGEMENT - SITE SETTINGS

	☐ Group name - if team has DBA (Only if not using custom logo)
	    ☐ Display group name - checked if team has a DBA (Only if not using custom logo)
	☐ Color theme - Selection from Form
	☐ Primary contact - Selection from form or site owner
	    ☐ If Primary Contact is different from the site owner, site owner should have workflow emails checked, not the person selected as Primary Contact
	☐ Image theme - Selection from Form
	☐ Address Label set to DBA
	☐ Phone Numbers checked to be displayed in footer

	WEBSITE MANAGEMENT - GROUP SOCIAL MEDIA
	☐ Add social media links if team has them on their current site (*Do not add YouTube, this may change*)
	WEBSITE MANAGEMENT - GROUP LOGO

	☐ Group logo added if they have a custom logo
	    ☐ Logo size for theme 1 and 3: 285x135 (max)
	    ☐ Logo size for Theme 2: 295x90 (max)

	VISUAL QA INSPECTION

	☐ Advisor Logo Displayed if present -or- RJ Logo displayed
	    ☐ If custom logo: appropriate size, quality, spacing, buffer
	    ☐ DBA displayed if they have a DBA.
	    ☐ RJA DBA's should include "Of Raymond James"
	☐ Banner selection matches form selection
	☐ Client niches match form selection (Selection from form or first 6 client types selected if no selections present)
	☐ Category tiles link are correct and rendered properly
	    ☐ If form had "Do not Include About RJ" check to ensure correct selection and appearance of tiles
	☐ Media carousel has content and links function properly
	☐ Quote (Selection from form, verify correct author selected)
	☐ Address and standard disclaimers are in the footer - pulls from CSS
	☐ Address Label: DBA
	    ☐ RJA DBA's should include "Of Raymond James"
	☐ Phone numbers and labels in footer match site
	☐ Social Media Icons present (if on original site)
	    ☐ Social Media Email icon present
	☐ BrokerCheck bar is displayed across footer

	OUR CLIENTS PAGES - OPEN SITE URL
	☐ Clients pages - Selection from Form (*delete any extras*)

SERVICES PAGES - OPEN SITE URL

- [ ] Services pages - Selection from Form (*delete any extras*)

ABOUT US - OPEN SITE URL

- [ ] Bio Tile has been added and images are correct dimensions (206x248)
- [ ] Bio Tile images are clickable and go to person's bio page
- [ ] CFP Disclosure (only if there is a CFP on the site)

BIO PAGES - OPEN SITE URL

- [ ] Name, corporate title, job title and designations are accurate (*if applicable, not all will have all three*)
    - [ ] Financial Advisor should be first if present
    - [ ] CFP Designation should be first
        - [ ] Format: CFP®
- [ ] Bio copy content matches their old site
    - [ ] Clean up copy formatting to present it better
- [ ] Social media icons are present (if they have them) and link properly
- [ ] Any custom disclosures have been added, i.e. CFP, etc.
- [ ] CFP Disclosure added to About Us Page if any advisor on the bio tile is a CFP

OUR APPROACH - OPEN SITE URL

- [ ] Selection from Form
    - [ ] If the form selection is "OurApproach_Expertise for the big picture and finer details" the component to use is "OurApproach_Blended"
- [ ] Components to check: Small Banner, Intro Text
- [ ] The form will have the name of the data source item, the selection should match the form on the above components

WHAT MAKES US DIFFERENT - OPEN SITE URL

- [ ] Selection from Form
- [ ] Components to check: Small Banner, Intro Text, Rich Text Component
- [ ] The form will have the name of the data source item, the selection should match the form on the above components

WHY WORK WITH A CFP OR PROFESSIONAL RECOGNITION PAGE - OPEN SITE URL

- [ ] If CFP or other Professional Designations are present on site, ensure that content from [Content Release 8/17/2017] has been included
- [ ] If only CFP present:
    - [ ] Use Why Work With A CFP
- [ ] If more than just CFP is present:
    - [ ] Use Professional Recognition page
    - [ ] You must remove the designations from the page that do not apply
        - [ ] You must also remove Disclosures that do not match the designations on the site, currently only CIMA, CPWA and CFP have disclosures on this page
    - [ ] Current Designations on the Professional Recognition page: (these are in order as they appear on the unmodified page)
        CFP® - Certified Financial Planner™
        CDFA™ - Certified Divorce Financial Analyst®
        ChFC® - Chartered Financial Consultant®
        CIMA® - Certified Investment Management Analyst®
        CPWA - Certified Private Wealth Advisor®

ABOUT RAYMOND JAMES - OPEN SITE URL

- [ ] Selection from Form
- [ ] Components to check: Small Banner, Intro Text, Rich Text Component
- [ ] The form will have the name of the data source item, the selection should match the form on the above components

MIGRATION REVIEW - OPEN OLD SITE URL (CUSTOM PAGES)

- [ ] All Custom Pages should have Banners with images.
- [ ] All Custom Pages should have intro text components and may have other components as required by the content
- [ ] Check all custom pages for content that should be carried over
    - [ ] Verify all custom content was migrated

PROCESS MANAGEMENT

- [ ] Add a checklist to the Trello card with all corrections that need to be made.
- [ ] Move your sites' Trello card from the 'Ready to QC' lane and into the appropriate QC Round lane (round 1 or round 2)

Process - Preview Email

Wednesday, September 20, 2017 7:52 AM

	PROCESS MANAGEMENT

	☐ When a site is marked for preview:
	  ☐ Draft an email using Templated Email: Preview
	    ☐ Set the proper greeting (morning, afternoon, night, Primary FA's name
	    ☐ Set the website preview link
	    ☐ Change the Preview date in the email to +3 days from the day you send the email
	  ☐ Confirm all information is correct
	  ☐ Use Primary FA's email address from form
	  ☐ Send as Web Services
	  ☐ Move card in Trello to 'Preview Email Sent', set the due date on the card to the date you used in the email
	  ☐ **Responses:**
	    ☐ The e-mails state that they only have three days to get back to us with a preview. After those three days have passed and we have not received a response, we should be moving the site through. There are only two exceptions to this:
	      ☐ If you receive an out of office message after sending this message.
	        ☐ Make a note of their out of office return date and send them a note again when they have returned.
	      ☐ If they reply with an expression of acknowledgement and state they will be getting back to you.
	        ☐ If three days pass and they don't reply, send them a reminder and advise that we haven't received a response and that the three days have passed. If no response is received after an additional three days, go ahead and move the site through.
	    ☐ It's very likely that some of the guys may respond to the e-mail after the three days have passed and the site has yet to be published. If that's the case, you can make the changes if they're in scope. Please be cognizant of the changes they are requesting in the odd case where it requires that the site go back through to compliance.
	    ☐ Out of Scope requests should be escalated to Jessica

Process - Submit to Compliance

Tuesday, December 27, 2016 11:33 AM

	PROCESS MANAGEMENT

	☐ IAD and Correspondent sites do not go through our compliance, they have their own compliance departments
	☐ From the Content Editor Lock and Edit the following items
	    ☐ SITENAME
	    ☐ Bios
	    ☐ custom pages
	    ☐ any standard page with custom verbiage
	☐ Go to the workbox, locate your site from the site dropdown, wait for it to reload and show your site, hit submit to compliance (All)
	☐ Ensure that nothing for your site remains in the draft state, everything not submitted to compliance should be in the published state
	☐ Move your sites' Trello card from the 'Ready for Compliance' swim lane and into the 'Compliance Review' swim lane
	    ☐ This is what notifies Compliance that they need to look for a site. They receive no notification from Sitecore that a site is in their queue

Process - Publishing Steps

Thursday, March 03, 2016 1:02 PM

WORKBOX

- [ ] Filter list by your site name, your site items will all be in pending publish
    - [ ] If there are any items in draft, ensure they are pushed all the way through the queue
    - [ ] Select your site items then click 'Publish (All)'

ADD BILLING INFORMATION TO SITE (Pulled from Form and from Migration List and Domain Migration)

- [ ] Monthly recurring charge for maintenance package
    - [ ] Select Service (Bronze, Silver, Gold)
    - [ ] Select Bill to Information (selection from form)
    - [ ] Set purchase date to current date
    - [ ] For split billing:
        - [ ] select Split FA
        - [ ] Split billing number: The number listed on the card next to 'Bill to:'
- [ ] Add custom domain
    - [ ] Look up the custom domain from the card on Enom
        - [ ] Change redirect from the SC7 address to www.raymondjames.com/SITENAME
        - [ ] If custom domain cannot be found in enom, verify that we do not own the domain by using https://whois.icann.org/en to look up the domain)
    - [ ] Select Domain Name (3 types, Domain Name, Domain Name - Advisor Owned, Domain Name - Gold Package)
    - [ ] Billing information: Using the information from SC7 Dashboard, use the purchase date as labeled in SC7. If this day has passed, set it for +1 year.
        - [ ] Example: if the domain was purchased 9/7/2016 then set it for 9/7/2018 (we do not want people to be hit for the renewal again if they have already paid it)
        - [ ] If the date has not passed, then use that date
    - [ ] Add Domain address as a note in SC8 notes/comments area
    - [ ] Gold Maintenance Packages include 1 free domain (select Domain Name - Gold Package)
- [ ] Save changes

GOOGLE ANALYTICS PROPERTY (95% of SC7 sites should already have a GA property, download tag assistant by Google for Chrome)

- [ ] For existing sites (all migrations should have been migrated from something!)
    - [ ] If they already have a Google Analytics account, use that UA Code on the new site.
        - [ ] Update URL in View Settings and Property Settings:
            - [ ] Change the Address from the SC7 Address to the SC8 Address (IE: https://cipnewmexico.website.raymondjames.com/ to https://www.raymondjames.com/cipnewmexico)
            - [ ] This will also have to be done for All Website Data and for Unfiltered views
            - [ ] These fields are used for the reports that run, a site will still collect data if it is wrong, but should be corrected for data management purposes
    - [ ] If they do not already have a Google Analytics Account then you will need to create one
        - [ ] Create Google Analytics property for site (login to web service analytics account) (Login Information)
        - [ ] Note: If you're adding a IAD/CORR site, make sure that you're using the CUSTOM URL and not the raymondjames.com url.
- [ ] Go to your sites SITENAME item, put the UA code in the Google Analytics Tracking ID area (NOTE: ONLY use the UA-XXXXXXX code, that's all you need)
    - [ ] Do NOT add it to the Google Tag Manager section.

WEBSITE MANAGEMENT - WEBSITE STATUS

- [ ] Update status to Live, save changes
    - [ ] When you click save, in the options box that appears, click 'Save and Publish'
    - [ ] You may need to do a second publish from the content editor, just in case something hasn't published fully from the first publish, this sometimes happens to people items.

VISUAL QA INSPECTION INITIAL

- [ ] Verify that the site appears correctly on the CD server: https://scrcd01apwpd.rjf.com/meklerwealth (change meklerwealth to your site)
    - [ ] If there appears to be something loading incorrectly with the navigation/header/footer, verify using the information from Page Caching Fix
- [ ] Verify location information appears correct (If not, republish location item.)
- [ ] Verify Bio pages show up in the drop down menu (If not, republish people item.)
    - [ ] **You must verify that everyone appears on the site as expected.**
- [ ] Verify bio details appear correctly within template style.
    - [ ] There should be no odd font weights, or different font weights, ideally there should be no inline styles unless absolutely required to make the bio appear presentable.
- [ ] The site should be verified as appearing on the CD server, if it does not appear then do not add it to the proxy server. Raise a flag on the card and alert someone.
- [ ] If CFP or other Professional Designations are present on site, ensure that content from Content Release 8/17/2017 has been included

REDIRECTS (Do Not Manually Type Addresses, Verify site works then copy/paste from browser into spreadsheet)

- [ ] Add site to the redirect sheet:
    - [ ] (EXAMPLE) From: https://www.raymondjames.com/cipnewmexico
    - [ ] (EXAMPLE) To: https://cipnewmexico.website.raymondjames.com/
    - [ ] 3rd Column: REMOVE (you need to put the word REMOVE in the 3rd column)
- [ ] Redirect SC7 Site to SC8
    - [ ] (EXAMPLE) From: https://cipnewmexico.website.raymondjames.com/
    - [ ] (EXAMPLE) To: https://www.raymondjames.com/cipnewmexico
    - [ ] 3rd Column: ADD (you need to put the word ADD in the 3rd column)
- [ ] Redirect All Bio Pages from SC7 Bio Pages to SC8 Bio Pages
    - [ ] (any team members present on SC7 site that you cannot add to the SC8 site should have their SC7 links redirected to the root SC8 site page)
        - [ ] (EXAMPLE) From: https://pbkwealthmanagement.website.raymondjames.com/your-team/benjamin-edmund-price
        - [ ] (EXAMPLE) To: www.raymondjames.com/pbkwealthmanagement/about-us/bio?_=Ben.Price
        - [ ] 3rd Column: Add
- [ ] Full Example of what redirects could look like:

https://www.raymondjames.com/idaho	https://idaho.website.raymondjames.com	Remove
https://idaho.website.raymondjames.com	https://www.raymondjames.com/idaho	Add
https://idaho.website.raymondjames.com/your-team/mark-young	https://www.raymondjames.com/idaho/about-us/bio?_=Mark.Young	Add
https://idaho.website.raymondjames.com/your-team/kelli-jenkins	https://www.raymondjames.com/idaho/about-us/bio?_=Kelli.Jenkins	Add
https://idaho.website.raymondjames.com/your-team/h-ralph-perez	https://www.raymondjames.com/idaho/about-us/bio?_=Ralph.Perez	Add
https://idaho.website.raymondjames.com/your-team/tamara-douglass	https://www.raymondjames.com/idaho/about-us/bio?_=Tami.Douglass	Add
https://idaho.website.raymondjames.com/your-team/aaron-burke	https://www.raymondjames.com/idaho/about-us/bio?_=Aaron.Burke	Add
https://idaho.website.raymondjames.com/your-team/julisa-perez	https://www.raymondjames.com/idaho/about-us/bio?_=Julisa.Perez	Add

FINAL STEPS

- [ ] Move your sites' Trello card from the 'Ready to Publish' swim lane and into the 'Published' swim lane

Process - Post Publishing

Thursday, February 09, 2017 8:27 AM

	SITE VERIFICATION (THE SITE MUST BE VERIFIED AS LIVE BEFORE YOU CONTINUE)

	☐ In the Publishing lane in Trello:
	  ☐ Open each card and Verify all URL's for the live site work
	    ☐ Custom Domains
	      ☐ Verify Custom Domain redirects properly (Domain masking turned off, etc)
	        ☐ If Custom Domains are not redirecting properly log in to Enom and look up the site
	          ☐ If found, click host records
	            ☐ record type: URL redirect
	            ☐ Verify correct address
	            ☐ If domain masking WAS on for the site change it from URL Frame to URL Redirect
	☐ If the Site still shows the SC7 site, double check on a fresh screen, incognito mode, then check your phone, or have another team member verify. If SC7 site still appears, check the redirects and proxies spreadsheet to verify that it was submitted
	☐ After the site has been verified live, move the card into the Post Publishing Cleanup lane then move on to the next steps. Every card must be verified live before any other steps can be performed for that specific card.
	  ☐ If a site is already in the Post Publishing Cleanup lane it may have been moved by another member of the team (and thus verified), although it could have been accidently moved, **re-verify** the site

	CANCEL SITE IN SITECORE 7 PLATFORM

	☐ Log in to Sitecore 7 https://rjfoundry.rjf.com/sitecore/login (you need to use IE, and you need to add rjf.com to your compatibility view settings)
	  ☐ Pro Tip: click on options, then desktop before you log in
	  ☐ Pro Tip on searching: if you cannot find the site in content editor, look for it in foundry control center first, it may have had its named changed, but content editor doesn't rename, foundry control center will have both the old name and the new name searchable
	☐ From the content editor find your site under: Content > Sitecore Foundry > Websites
	  ☐ Click on the plus sign on your SITENAME and drill down to Home > Global > Site Info
	  ☐ Scroll down to change Unpublish Date and Billing End Date to today's date (by pressing Now)
	  ☐ If Recognition level is set to "Select a recognition level" just change that drop down to "none"
	  ☐ Change workflow state to published, check the item back in
	  ☐ Under site info there may be additional sub items (custom domains)
	    ☐ Change bill end date to current day
	      ☐ Add Custom Domains to SC8 site.
	        ☐ If we own the domain set billing properly
	        ☐ If we do not own the domain record in SC8 as Domain Name - Advisor Owned
	☐ Click on the sitecore start button (like windows), select Foundry Control Center
	  ☐ Click Search, type in your site name in the text field, click on the search button
	  ☐ Select your site and either right click the site and click Edit OR select the site, then click the home button and hit edit from the ribbon
	  ☐ In the State field, change this to Stopped, click ok
	  ☐ From the home ribbon, click publish site (ensuring you still have the correct site selected)
	  ☐ Publish those changes and within 15-30 minutes the site will be stopped and taken down.

	CSS Updates

	☐ Update the CSS website address field for all people on the site, following CSS Updates
	  ☐ If a person has their own site listed in the Online Address field you can leave this
	  ☐ If Person has custom domain listed in their CSS
	    ☐ Verify that it is for the site you are working on and migrate that into billing for SC8 as above

	PROCESS MANAGEMENT
	☐ Move your sites' Trello card into the 'Site Migration Completed' swim lane