Launching a Platform - Playbook

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# Project Initiation

### Agreement signature

Partner sends signed agreement

### Kick-off call

See Partnership Kickoff [Playbook](https://docs.google.com/document/d/1KBvj0kUtIlw-2KB80q70RS2RyORRQu-P-qlCqdPyN58/edit)

* Update Website Integration deck with any new CTAs
* Create [LO Webinar invitation](https://docs.google.com/document/d/1DmDz0gxwA6L56IYurR3MBdrKh5PPWA5jU61pG9y4P-c/edit)
* Create [Marketing Initiatives deck](https://docs.google.com/presentation/d/1odaIR0KmYN8gEjELkBUHcLvaN44Nw6XGe1O0Wn4FRnA/edit#slide=id.g2587ba4d18_0_45)
* Create Realtor Webinar invitation

### Partner sends information for customization

* Information about loan officers
* Brand guidelines

### Tagging

* Development team sends the partner instructions on how to implement web analytics integration (tagging) and partner implements on their side

# Customization & Testing

### First version of the platform is developed

* Platform is tested internally

### “Stage” platform is delivered to partner

* Partner tests, reviews, and suggests modifications
* NestReady approves and implements the modifications
* Partner approves the deliverables

# Project Launch Plan

### LO Webinar

Webinar to educate partner’s personnel and LOs. To be hosted either by NestReady or partner (was decided during project initiation).

### Realtor Webinar

Webinar to educate real estate agents from the partner’s network (only if the partner has its own network of realtors).

### Revision of Marketing Initiatives

Revision of landing page and CTAs on partner’s website.

# Project Launch

### Implementation of CTAs

CTAs and landing page are implemented on partner’s website.

### Launch of platform

Platform is fully launched and ready to be used by homebuyers.