CareLink AI Launch Readiness Checklist

Ensure You're 100% Ready Before Launch

Document Version: 1.0
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Purpose: Step-by-step checklist to ensure nothing is missed before each launch phase

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How to Use This Checklist

Instructions:
- Review checklist for your current phase
- Check off items as you complete them
- Do NOT proceed to launch until all items are ✅
- If any item is ❌, address it before launching

Phases:
1. **Pre-Launch** (Before Week 1)
2. **Beta Launch** (Week 5)
3. **Paid Launch** (Month 3)
4. **Scale Phase** (Month 7+)

PHASE 1: Pre-Launch Readiness (Before Week 1)

Platform & Technical

Core Platform:
- [ ] Website/app deployed and accessible
- [ ] All core features working (search, profiles, messaging)
- [ ] Mobile responsive (test on iPhone, Android)
- [ ] Page load speed < 3 seconds
- [ ] No console errors (check browser dev tools)
- [ ] Test on multiple browsers (Chrome, Safari, Firefox, Edge)

Database & Backend:
- [ ] Database set up (Supabase/Railway)
- [ ] Backup system configured (automated daily backups)
- [ ] Environment variables secured (not exposed in code)
- [ ] API endpoints working (test all routes)
- [ ] Error handling in place (graceful failures)

Security:
- [ ] SSL certificate active (HTTPS, not HTTP)
- [ ] Authentication working (sign-up, login, logout, password reset)
- [ ] User data encrypted (passwords hashed, sensitive data protected)

- [ ] CSRF protection enabled
- [ ] Rate limiting configured (prevent abuse)
- [ ] Security headers set (CSP, X-Frame-Options, etc.)

Monitoring & Analytics:
- [ ] Google Analytics 4 installed and tracking
- [ ] Google Search Console verified and sitemap submitted
- [ ] UptimeRobot monitoring configured (alerts for downtime)
- [ ] Error logging set up (Sentry or similar - optional but recommended)

Content & Pages

Essential Pages:
- [ ] Homepage (clear value proposition, CTAs)
- [ ] How It Works (for families, operators, caregivers, discharge planners)
- [ ] Pricing Page (all tiers, FAQs, ROI calculator)
- [ ] About Page (founder story, mission, team)
- [ ] Contact Page (email, phone, contact form)
- [ ] FAQ Page (top 20 questions answered)
- [ ] Terms of Service (LegalZoom template, customized)
- [ ] Privacy Policy (GDPR/CCPA compliant)

Blog Posts (Pre-Publish 3-5):
- [ ] Blog post 1: “How to Choose the Right Assisted Living Facility (2026 Guide)”
- [ ] Blog post 2: “10 Questions to Ask on Your First Facility Tour”
- [ ] Blog post 3: “Understanding Memory Care: Is It Right for Your Loved One?”
- [ ] (Optional) Blog post 4: “How to Afford Senior Care: Medicare, Medicaid, and More”
- [ ] (Optional) Blog post 5: “5 Signs It’s Time for Assisted Living”

Social Media Profiles:
- [ ] LinkedIn company page created (logo, banner, description)
- [ ] LinkedIn personal profile updated (founder, bio mentions CareLink AI)
- [ ] Twitter/X account created (handle, bio, profile pic)
- [ ] Facebook page created (optional, if targeting families)
- [ ] All profiles linked to website

Automation & Tools

Email Automation (Mailchimp):
- [ ] Mailchimp account created
- [ ] 3 audiences created (Operators, Families, Professionals)
- [ ] Welcome email sequences created (Operators: 5 emails, Families: 3 emails)
- [ ] Beta-to-paid sequence created (4 emails)
- [ ] Test emails sent (verify automation works)

Forms & CRM:
- [ ] Tally forms created (Operator beta, Family inquiry, Discharge planner inquiry)
- [ ] Google Sheets CRM created (3 sheets: Operators, Families, Discharge Planners)

- [ ] Make.com automation set up (form → Sheets → Mailchimp → Notification)
- [ ] Test automation (fill out form, verify flow works)

Social Media Scheduling (Buffer):
- [ ] Buffer account created
- [ ] 3 social accounts connected (LinkedIn personal, LinkedIn company, Twitter)
- [ ] Posting schedule configured (Mon/Wed/Fri 8am, Tue/Thu 12pm)
- [ ] 10-15 posts pre-created and scheduled (first 2 weeks of content)

Analytics Dashboard:
- [ ] Founder dashboard created (Google Sheets template)
- [ ] Metrics tracked: MRR, customers, sign-ups, traffic, conversions
- [ ] Weekly review process defined (every Monday 9am)

Legal & Compliance

Business Setup:
- [ ] Business entity formed (sole proprietor, LLC, or corporation)
- [ ] Business bank account opened (separate from personal)
- [ ] Accounting system set up (QuickBooks, Wave, or spreadsheet)
- [ ] Domain registered (yourcompany.com)
- [ ] Business email set up (founder@yourcompany.com)

Legal Documents:
- [ ] Terms of Service published on website
- [ ] Privacy Policy published on website
- [ ] Cookie consent banner added (if tracking cookies)
- [ ] GDPR compliance (if serving EU users - data export, deletion)
- [ ] CCPA compliance (if serving CA users - “Do Not Sell My Info” link)

Insurance (Optional but Recommended):
- [ ] General liability insurance purchased ($200-$500/year)
- [ ] Professional liability/E&O insurance (if providing advice)

Marketing Prep

Outreach Lists:
- [ ] Operator prospect list built (200-300 facilities with names, emails, LinkedIn URLs)
- [ ] Discharge planner list built (50-100 contacts)
- [ ] Partnership list built (elder law attorneys, geriatric care managers, etc.)

Email Templates:
- [ ] Cold outreach email template (Operator - 3-email sequence)
- [ ] Follow-up email templates
- [ ] Break-up email template
- [ ] Discharge planner outreach template
- [ ] Partnership outreach template

Sales Materials:
- [ ] One-pager PDF (value prop, pricing, ROI calculator)

- [ ] Demo script (15-min call script)
- [ ] Objection handling guide
- [ ] ROI calculator (Excel or online tool)
- [ ] Case study templates (for future use)

Content Calendar:
- [ ] 4-week content calendar created (blog, social, email)
- [ ] AI prompts saved (for content generation)
- [ ] Canva templates created (social graphics, blog images)

Budget & Resources

Budget Allocation:
- [ ] Budget spreadsheet created ($4,900/year allocation)
- [ ] Tool costs documented (monthly and annual)
- [ ] Payment methods set up (credit card for subscriptions)

Tools Subscribed:
- [ ] Hosting (Railway/Render) - $75/month
- [ ] Database (Supabase) - $25/month
- [ ] Email sending (Resend) - $20/month
- [ ] Domain (Namecheap) - $2/month
- [ ] All other tools on free tiers (Mailchimp, Buffer, Make.com, Canva, etc.)

Personal Preparation

Founder Mindset:
- [ ] Clear on “Why?” (purpose, motivation for building this)
- [ ] Weekly schedule planned (time blocks for outreach, product, content)
- [ ] Support system identified (co-founder, mentor, founder community, accountability partner)
- [ ] Burnout prevention plan (boundaries, rest days, celebration milestones)

Skills & Learning:
- [ ] Watched/read tutorials on key tools (Mailchimp, Make.com, Buffer)
- [ ] Practiced demo pitch (recorded yourself, refined)
- [ ] Read competitor websites (know their positioning, pricing)
- [ ] Read 1-2 books on B2B SaaS sales (optional but helpful)

Final Pre-Launch Checks

Testing:
- [ ] End-to-end user flow test (Family: sign up → search → inquire)
- [ ] End-to-end user flow test (Operator: sign up → create listing → receive inquiry → respond)
- [ ] Mobile testing (all flows work on mobile)
- [ ] Speed test (GTmetrix or Google PageSpeed - score 80+)
- [ ] Broken link check (all links working)
- [ ] Email deliverability test (send test emails, check spam folder)

Go/No-Go Decision:
- [ ] All critical items ✅ (no blocking issues)
- [ ] You feel confident and ready
- [ ] Support systems in place (you're not alone)
- [ ] First 3 beta prospects identified (know who you'll reach out to)

✅ **If all checked: READY TO LAUNCH!**

PHASE 2: Beta Launch Readiness (Week 5)

Platform Refinements

Based on Week 1-4 Feedback:
- [ ] Top 3 bugs fixed (from internal testing)
- [ ] UX improvements made (simplified forms, clearer CTAs)
- [ ] Performance optimizations (if site slow)
- [ ] Mobile fixes (if issues found in testing)

Beta-Specific Features:
- [ ] Beta badge/label added (on operator profiles or dashboard)
- [ ] Feedback form created (Tally or Typeform - easy for beta users to share feedback)
- [ ] Weekly check-in process defined (how you'll collect feedback)

Beta User Recruitment

Recruitment Plan:
- [ ] Beta landing page created (benefits of joining beta, application form)
- [ ] Beta application form live (Tally form with qualifying questions)
- [ ] Beta recruitment email templates ready (outreach to prospects)
- [ ] LinkedIn posts scheduled (beta announcement)
- [ ] Reddit posts drafted (for r/AgingParents, r/caregivers - tasteful, not spammy)

Recruitment Targets:
- [ ] Goal set (15-30 operators, 50-100 families, 50-100 caregivers, 5-10 discharge planners)
- [ ] Daily outreach routine defined (how many emails, LinkedIn messages, calls)
- [ ] Tracking system in place (CRM: status = "Beta Prospect", "Beta Applied", "Beta Accepted")

Beta Onboarding

Onboarding Process:
- [ ] Welcome email (beta) created (thanks for joining, next steps, expectations)
- [ ] Onboarding call script (optional 15-min call to help operators set up)
- [ ] Quick start guide created (PDF or video - "How to complete your profile in 5 minutes")
- [ ] FAQ for beta users (What's expected? How long? When does paid launch?)

Communication Plan:
- [ ] Weekly beta update email (what's new, what's coming, ask for feedback)

- [ ] Slack or Discord community (optional - for beta users to chat, ask questions)
- [ ] Personal phone number or email (beta users can reach you directly)

Success Metrics

Tracking:
- [ ] Beta metrics dashboard created (Google Sheets)
- [ ] Metrics defined: Active users, engagement rate, leads delivered, feedback submitted
- [ ] Weekly goals set (Week 5: 5 beta operators, Week 6: 10, Week 7: 15, Week 8: 20-30)

Go/No-Go Decision

Week 4 Review (Day before Beta Launch):
- [ ] Platform stable (no critical bugs)
- [ ] Automation working (emails sending, forms capturing leads)
- [ ] First 3-5 beta prospects identified (ready to invite Day 1)
- [ ] You're rested and energized (not burned out)

✅ **If all checked: LAUNCH BETA!**

PHASE 3: Paid Launch Readiness (Month 3)

Product Maturity

Beta Learnings Implemented:
- [ ] Top 5 beta user feature requests implemented (or in roadmap with timeline)
- [ ] All critical bugs fixed (no P0 or P1 bugs remaining)
- [ ] Product feels polished (no obvious rough edges)
- [ ] Load testing done (can handle 100+ concurrent users)

User Experience:
- [ ] Operator onboarding < 10 minutes (from sign-up to first lead)
- [ ] Family search < 30 seconds (to find relevant facilities)
- [ ] Messaging works reliably (no failed message deliveries)
- [ ] Mobile experience smooth (60%+ of users are on mobile)

Payment Processing

Stripe Setup:
- [ ] Stripe account verified (production mode, not test mode)
- [ ] Business bank account linked
- [ ] Identity verified (ID uploaded, approved)
- [ ] Subscription products created (Basic $49, Professional $149, Enterprise $299)
- [ ] Annual plans created (Basic $470, Professional $1,430, Enterprise $2,870)
- [ ] Customer portal enabled (customers can manage billing self-serve)
- [ ] Webhook handler deployed (handles subscription events)

- [ ] Failed payment recovery set up (automatic retries + dunning emails)
- [ ] Tax calculation configured (Stripe Tax enabled, if using)

Payment Testing:
- [ ] Test checkout (use Stripe test card 4242 4242 4242 4242)
- [ ] Test upgrade (Basic → Professional)
- [ ] Test downgrade (Professional → Basic)
- [ ] Test cancellation (can customers cancel self-serve?)
- [ ] Test failed payment (use declining test card, verify retry logic)
- [ ] Test annual payment (full year charged upfront)
- [ ] Test refund (can you issue refund from Stripe dashboard?)

Billing Emails:
- [ ] Payment confirmation email (Stripe sends, or custom email)
- [ ] Receipt/invoice email (automated via Stripe)
- [ ] Failed payment email sequence (3 emails over 14 days)
- [ ] Subscription canceled email (confirmation + feedback request)
- [ ] Upgrade confirmation email (“You’re now on Professional plan!”)

Pricing Page

Content:
- [ ] All 3 tiers clearly displayed (Basic, Professional, Enterprise)
- [ ] Features listed per tier (comparison table)
- [ ] Pricing displayed (monthly and annual)
- [ ] Annual savings highlighted (“Save 20% = 2 months free”)
- [ ] Founding Member discount explained (for beta users)
- [ ] ROI calculator embedded (operators can calculate savings)
- [ ] FAQs addressed (10+ common pricing questions)
- [ ] Social proof added (testimonials, logos, case studies)
- [ ] CTAs clear (“Start Basic Trial”, “Choose Professional”, “Contact Sales”)

Testing:
- [ ] All links work (buttons go to correct checkout pages)
- [ ] Responsive on mobile (pricing table easy to read)
- [ ] Fast loading (< 2 seconds)
- [ ] A/B test ideas noted (for future optimization)

Beta-to-Paid Conversion Campaign

Communication Timeline:
- [ ] Week 6 of Beta: Soft announcement email sent (“Pricing coming soon”)
- [ ] Week 8 of Beta: Official pricing announcement sent (Founding Member offer)
- [ ] Month 3, Day 1: Launch day email sent (“We’re live!”)
- [ ] Week 2-4 of paid: Follow-up sequence sent (to non-converters)

Sales Calls:
- [ ] Schedule 1-on-1 calls with top 10 beta operators (personal outreach)
- [ ] Call script prepared (beta-to-paid conversion script)

- [ ] Objection handling guide ready (price, lead quality, timing objections)
- [ ] Calendar links sent (Calendly for easy booking)

Incentives:
- [ ] Founding Member discount codes created (Stripe coupon codes)
- [ ] Grandfather pricing policy documented (30% Year 1, 20% lifetime)
- [ ] Annual prepay incentive offered (20% discount)
- [ ] Referral program launched (refer a friend, both get 1 month free)

Marketing & Growth

Content:
- [ ] Case studies created (2-3 beta operator success stories)
- [ ] Testimonials collected (5-10 quotes with permission to publish)
- [ ] Launch blog post written ("Introducing CareLink AI: A Better Way to Find Senior Care")
- [ ] Social media launch posts scheduled (LinkedIn, Twitter, Facebook)

PR & Outreach:
- [ ] Press release drafted (optional, for local news)
- [ ] HARO responses prepared (respond to journalist queries)
- [ ] Industry blog outreach (pitch guest post ideas)
- [ ] Local media contacted (pitch founder story, local angle)

Paid Ads (Optional, Month 7+):
- [ ] Google Ads account set up (if testing)
- [ ] LinkedIn Ads account set up (if testing)
- [ ] Test budget allocated ($50-100 for initial tests)
- [ ] Ad creatives prepared (headlines, copy, images)
- [ ] Landing pages optimized (for ad traffic)

Customer Support

Support Channels:
- [ ] Support email set up (support@yourcompany.com)
- [ ] FAQ page comprehensive (covers 80% of questions)
- [ ] Gmail canned responses created (10+ templates for common questions)
- [ ] Live chat (optional - Intercom free tier or similar)
- [ ] Response time SLA defined ("We respond within 4 hours during business hours")

Support Materials:
- [ ] Help articles written (How to create listing, How to optimize profile, etc.)
- [ ] Video tutorials created (optional - Loom screen recordings)
- [ ] Onboarding checklist for new customers (emailed after sign-up)

Legal & Compliance

Refund Policy:
- [ ] 30-day money-back guarantee documented (on pricing page)

- [ ] Refund process defined (how customers request, how you process)
- [ ] Stripe refund testing (you know how to issue refunds)

Terms Updates:
- [ ] Terms of Service updated (include subscription terms, refund policy)
- [ ] Privacy Policy updated (payment processing, Stripe data sharing)
- [ ] Cancellation policy clear (customers can cancel anytime, no penalties)

Success Metrics & Goals

Month 3 Goals:
- [ ] 6-18 paying operators (40-60% beta conversion)
- [ ] $720-$2,880 MRR
- [ ] <10% churn (ideally 0-1 churned customer)
- [ ] 80%+ customer satisfaction (NPS survey after 30 days)

Tracking:
- [ ] MRR tracked daily (Stripe dashboard + Google Sheets)
- [ ] Churn tracked weekly (who canceled? Why?)
- [ ] Conversion funnel analyzed (beta → trial → paid → active)

Go/No-Go Decision

Week 8 Beta Review (2 days before Paid Launch):

✅ **GREEN LIGHT (Launch Paid on Schedule):**
- [ ] 10+ operators actively using platform
- [ ] 30+ families actively searching
- [ ] 80%+ beta operators say "I would pay for this" (survey)
- [ ] 5+ family-operator connections (tours booked or placements)
- [ ] No critical bugs
- [ ] Payment processing tested and working
- [ ] You feel ready and confident

⚠️ **YELLOW LIGHT (Delay 2 Weeks):**
- [ ] 5-10 operators actively using
- [ ] 60-80% would pay
- [ ] Product issues fixable in 2 weeks
- [ ] Decision: Extend beta, fix issues, then launch

🔴 **RED LIGHT (Pivot/Reassess):**
- [ ] <5 operators actively using
- [ ] <50% would pay
- [ ] Fundamental product-market fit concerns
- [ ] Decision: Pause, conduct deep user interviews, iterate or pivot

✅ **If GREEN LIGHT: LAUNCH PAID PLANS!**

PHASE 4: Scale Readiness (Month 7+)

Product Scalability

Performance:
- [ ] Load testing completed (can handle 500+ concurrent users)
- [ ] Database optimized (queries < 100ms)
- [ ] CDN configured (static assets cached)
- [ ] API rate limiting in place (prevent abuse)
- [ ] Horizontal scaling possible (can add more servers if needed)

Features:
- [ ] Premium lead credits launched (operators can purchase à la carte)
- [ ] Featured boost add-on launched ($99/month)
- [ ] Analytics dashboard enhanced (conversion tracking, ROI metrics)
- [ ] Integrations roadmap (CRM, PMS integrations planned)

Team & Hiring (Optional)

Hiring Plan:
- [ ] Job description written (VA, customer success, sales - when needed)
- [ ] Budget allocated (hire when MRR > $10K or time constraints critical)
- [ ] Onboarding process defined (how you'll train first hire)
- [ ] Tools for remote work (Slack, Notion, Loom, etc.)

First Hire Candidates:
- [ ] Virtual Assistant (Upwork, $15/hour, 10-20 hours/week)
- [ ] Customer Success Manager (part-time, when 50+ operators)
- [ ] Sales Development Rep (outbound outreach, when scaling)

Paid Acquisition Testing

Google Ads:
- [ ] Test campaign launched ($50-100 budget)
- [ ] Keywords identified ("assisted living [city]", "senior care leads")
- [ ] Landing page optimized (specific to ad traffic)
- [ ] Conversion tracking set up (Google Analytics goals)
- [ ] Cost per lead (CPL) tracked (target: <$50)
- [ ] Lead-to-customer conversion tracked (target: 20-30%)

LinkedIn Ads:
- [ ] Test campaign launched ($50-100 budget)
- [ ] Audience targeted (assisted living administrators, owners, directors)
- [ ] Ad creatives tested (carousel, single image, video)
- [ ] Cost per lead (CPL) tracked (target: <$50)

Decision Criteria:
- [ ] If CPL < $40 AND conversion rate > 20% → Scale budget to $200-500/month
- [ ] If CPL > $100 OR conversion rate < 10% → Pause ads, refine, retry
- [ ] Track ROI: Customer LTV should be 3-5x CAC (including paid ads)

Expansion Planning

Geographic Expansion:
- [ ] Top 3 target cities identified (where to expand next)
- [ ] Local SEO strategy per city (Google Business profiles, local content)
- [ ] Local partnerships identified (discharge planners, elder law attorneys per city)

Persona Expansion:
- [ ] Caregiver premium launched (optional $19/month subscription)
- [ ] Discharge planner incentives increased (based on usage data)
- [ ] Family premium (white-glove concierge service - Year 2 consideration)

Financial Health

Profitability:
- [ ] $10K+ MRR achieved (target by Month 12)
- [ ] Positive cash flow (revenue > expenses for 3+ consecutive months)
- [ ] 3-6 months operating expenses saved (cash reserves)
- [ ] Unit economics healthy (LTV:CAC > 5:1, payback period < 6 months)

Fundraising (Optional):
- [ ] Decision: Stay bootstrapped OR raise small round ($10K-$50K)
- [ ] If raising: Pitch deck prepared, target investors identified
- [ ] If bootstrapping: Reinvestment plan (how to use profit for growth)

Year 1 Review & Year 2 Planning

Year 1 Achievements:
- [ ] 50-126 paying operators (Conservative to Optimistic)
- [ ] $7,720-$27,610 MRR (Conservative to Optimistic)
- [ ] $40K-$151K total revenue
- [ ] <5% monthly churn
- [ ] Product-market fit proven (NPS > 40, organic growth)

Year 2 Goals:
- [ ] Double MRR ($15K-$50K MRR by end of Year 2)
- [ ] Expand to 2-3 new cities
- [ ] Hire 1-2 team members
- [ ] Launch new revenue streams (premium leads, caregiver premium)
- [ ] Reach profitability milestone ($50K-$100K annual profit)

Strategic Decision:
- [ ] Continue bootstrapping (self-funded growth)
- [ ] Raise small round ($25K-$100K from friends/family/angels)
- [ ] Pursue venture capital (if aiming for rapid scale)

Emergency Checklist (Use When Things Go Wrong)

If Platform Down

Immediate Actions (Within 1 Hour):
- [ ] Confirm: Is it really down? (Check from multiple locations, incognito)
- [ ] Check hosting status (Render/Railway status page)
- [ ] Check error logs (what's causing the issue?)
- [ ] Post status update (email users: "We're aware and fixing")
- [ ] Fix or rollback (deploy last working version if needed)
- [ ] Test: Verify fix works
- [ ] Communicate resolution (email users: "Fixed, here's what happened")

If Payment Processing Broken

Immediate Actions (Within 4 Hours):
- [ ] Test payment flow (is it really broken?)
- [ ] Check Stripe dashboard (any errors or alerts?)
- [ ] Check webhook logs (are webhooks being received?)
- [ ] Email affected customers ("Payment issues, your account is still active, we'll bill once fixed")
- [ ] Fix issue (debug webhook handler, Stripe config)
- [ ] Test end-to-end (verify payments work)
- [ ] Process failed payments manually (if needed)

If Major Customer Complains/Negative Review

Immediate Actions (Within 24 Hours):
- [ ] Read complaint carefully (what's the specific issue?)
- [ ] Verify claim (check customer account, logs)
- [ ] Respond publicly (acknowledge, explain, fix) - if review is public
- [ ] Reach out privately (email or call directly)
- [ ] Make it right (refund, discount, fix issue - whatever appropriate)
- [ ] Follow up (confirm resolution, ask to update review - gently)

Final Thoughts

Remember:
- Checklists reduce anxiety (you know you haven't forgotten anything)
- Don't be paralyzed by perfection (80% ready is good enough to launch beta)
- Iterate based on real user feedback (your assumptions will be wrong - that's okay)
- Celebrate milestones (checking off lists is progress - acknowledge it!)

You're ready. Launch with confidence! 🚀

Document Status: Complete
Last Updated: February 2, 2026
Next Action: Review QUICK_START_GUIDE.md for “What to do first”