mongoose cadence

Onboarding Checklist

	Stage 1: Strategy Building
✓	Schedule and attend intro call with Client Success Lead
	Submit Team Lead Form
	Determine texting goals and touchpoints using the Cadence Planning Guide
	Collect texting consent, construct texting policy, and send texting email announcement *(recommended)*

	Stage 2: In-Product Training
	Set up Cadence account via Welcome email
	Complete in-product training (see page 2)
	Configure data integration if necessary
	Conduct Admin Review Call with Client Success Lead, Team Leads, and all other Admins ● Review Admin level tools and answer any product related questions

	Stage 3: Implementation Wrap-Up
	Schedule Wrap-Up Call with Client Success Lead and Team Leads (all users are welcome to join) ● Review first texting campaign & relevant best practices ● Review and answer any product related questions
	Start texting!

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In-Product Training Checklist

Use the checklists below to track your teams' training progress. You may also relaunch any of the training modules by clicking the links below even after the initial training is complete.

Note: If you're using an ad blocker extension, you may need to disable it, or whitelist our domain name (sms.mongooseresearch.com), to be able to complete the in-product training and see helpful tips.

Administrators

	Get to know Cadence		Create Segments
	Set up fields and import contacts		Understand Campaigns
	Set up your team		Set up Templates
	Send your first text		Use automation
	Visit your inbox		Measure results

Users

	Get to know Cadence		Learn about Segments
	Send your first text		Use automation
	Visit your inbox		Measure results
	Learn about Campaigns		