

Force24™

Getting started.

Force24 Onboarding

Primary Contact:

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1 Welcome to Force24



We pride ourselves in providing a very personal onboarding experience. Our focus from the moment you sign your contract and send your first email is always with you, the marketer. We'll be with you every step of the way as you grow your business!

This document outlines everything you need to know to get you started on **your journey** with us.

2 Getting started: What to expect?

Book in Your First Onboarding Call!

Your CSM will guide you through your onboarding journey, with copious amounts of experience and inside tips to help you get going. Once you've signed, your CSM will contact you via email to introduce themselves and book in your first onboarding call. We recommend doing this as soon as you can.

Book a time that suits you [here](#).

Brand Guideline Handover

In preparation for your first session, we recommend having your brand guidelines to hand. If you don't have a formal set, don't worry! Your brand colour hex codes, some great images and a link to your website are all you need for us to start building your email snippets.

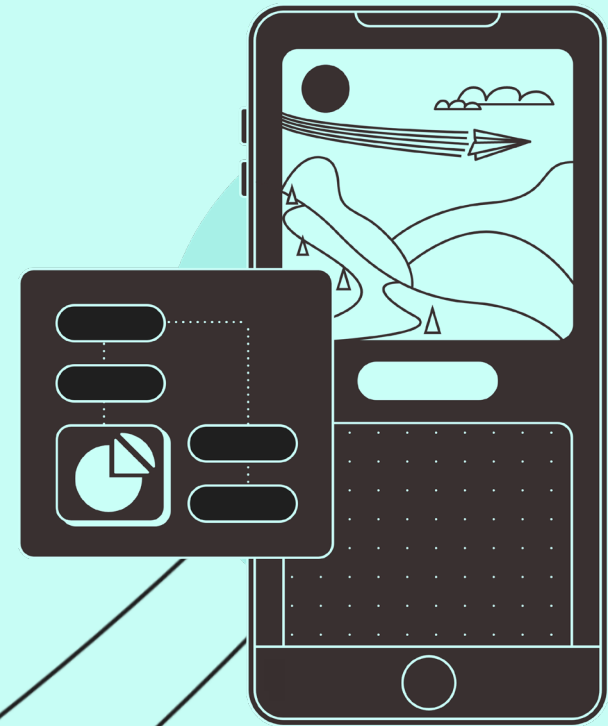
Account Access

We know how excited you are to get your hands on the Force24 platform, so look out for an account activation email to get started. This should be with you within 24 hours of your contract start date.

Send and Reply Addresses

Personalisation is key, so the first thing you need to do is ensure that the emails you're sending out are coming from YOU. Once your account is activated, read our step by step guide [here](#) to help you set up your send email address.

e.g. "hello@force24.co.uk".



3 Onboarding: Kick-off

Your First Onboarding Call

During this call, your CSM will walk you through all the steps to start using Force24 to its full potential from the off set, allowing you to ask any questions you might have. **The more prepared you are for your call the better!** Prepare by reading this document beforehand, so you can hit the ground running.

Your CSM will cover everything in this section, moving at your pace to ensure you're supported at every stage.

You are in control of how long the onboarding takes and we will support you to get there as quickly as possible.

While we will do the majority of the work to get you using Force24 as quickly as possible, there are some **key steps** that we need you to take...

1 Complete GDPR Documents

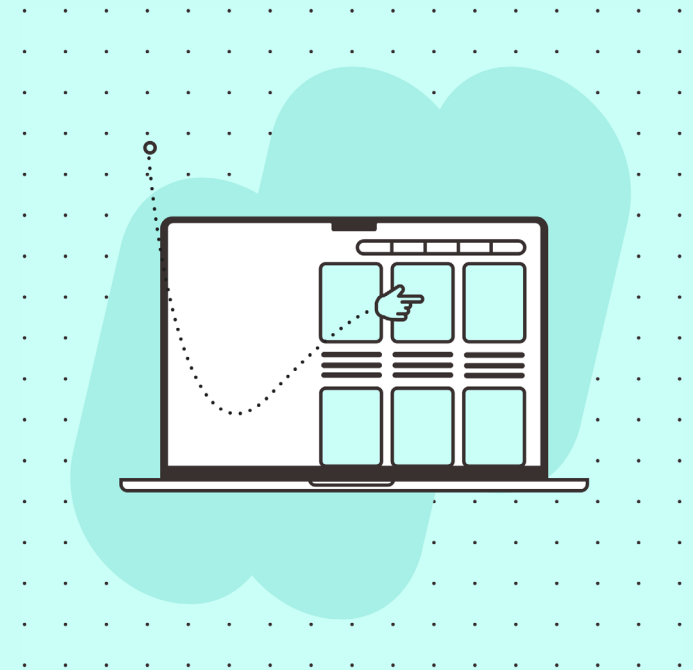
As a UK-based ISO9001 accredited business, we take our security seriously. Please review and complete these docs and send back to your CSM.

2 Domain and Microsite Setup

It's now time to add your own email and microsite subdomains whenever you're ready.

For email, this could be as simple as: *email.yoursite.com*.
For microsites, opt for something like: *staging.yoursite.com*,
landing.yoursite.com

Further details can be found [here](#).



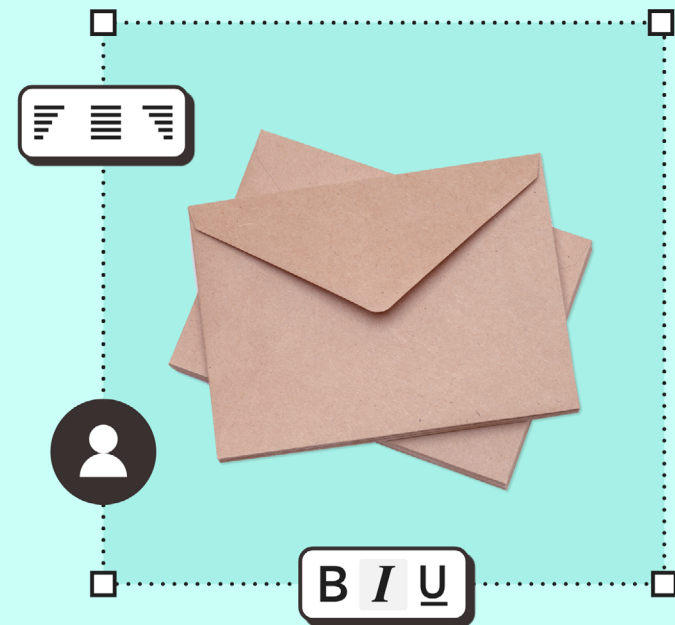
3 Data Upload via Platform

During the call we'll walk your through how to complete an initial data upload to the system. If you've already jumped on one of our training videos, you may be one step ahead of the game. Either way, your CSM is here to help and ensure you have all the information you need to start sending emails!

Useful links: [Data Upload - Setup Guide](#)

4 Creative

If you've already sent over the brand guidelines to your CSM, our creative team will be hard at work creating your snippets. As soon as these are completed, we'll send them across for your review. If you have any questions or want help deciding on snippet designs, let us know.



4 Tracking and data capture

Tracking Script

To fully utilise the Force24 platform, we recommend getting web tracking set up on your website as soon as possible. This will allow you to track when a contact has been on your website, which pages they visited and how they got there. You can also identify 'Goal URLs', which trigger emails once a contact has visited a designated page. Set up is easy and your CSM and our training team are always on hand to help if you need it.

Useful links: [How to deploy your Tracking Script](#)
[Video Tutorial](#)

Cookie Policy

As you work to implement the Force24 web tracking on your website, we'll also need to ensure that your privacy and cookie policies are updated to cover this new activity.

Please see [here](#) for full details.



5 Integration with your CRM

What to expect?

- 1 Scoping and requirements signoff
- 2 Authentication and mapping completion
- 3 Development
- 4 Force24 QA
- 5 User Acceptance Testing (UAT)
- 6 Go-Live!

If you have chosen to integrate with your CRM, your **Project Manager (PM)** will email you to schedule a call to discuss your requirements and share timelines.

The development of the integration can take anywhere between **7 - 30 working days**. This is subject to your integration package and cooperation with your PM.

Your **Customer Success Manager** will monitor the progress of your integration and be there to support the process.

6 Training and support

Meet the Team

We pride ourselves on our excellent free training and support for life, which is all done from our Leeds-based team. Our support team are available 9-5pm UK time via our chat function within the platform, where we provide a 2-minute SLA. We also have heaps of support that you can access 24/7 via our [Support HUB](#), including video tutorials, webinar recordings and lots of troubleshooting and 'how to' support articles.

Training

We have various training options available to suit your learning style. You can review all our training offerings [here](#).

We run live webinars every Wednesday, Thursday and Friday, which cover the 3 key areas of the platform and everything you need to get going with Force24. Access our webinar recordings [here](#).

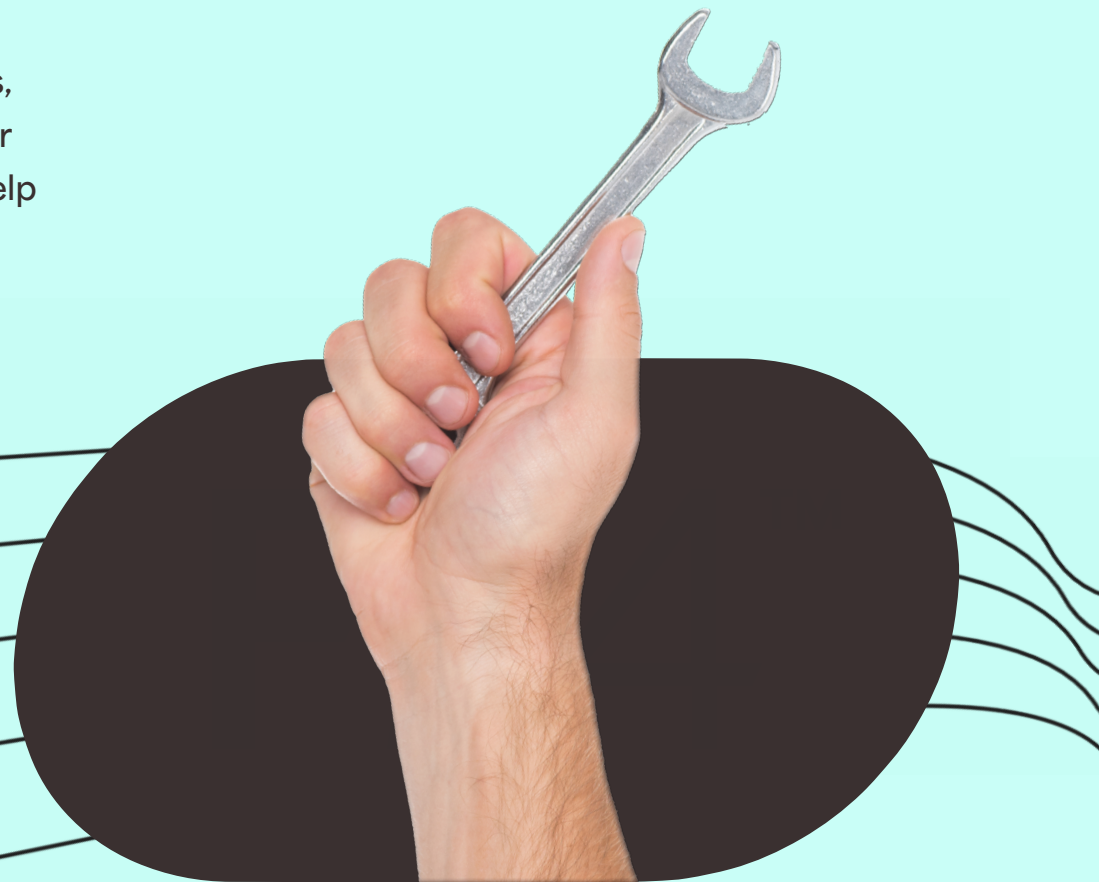
We are able to provide custom onsite group training if you prefer, which is not included in our **FREE** training for life. If you would like to know more about our onsite training options, please ask your Customer Success Manager for further details.



Support HUB

The Force24 [Support HUB](#) is your one-stop shop for anything and everything you need to get the most out of the platform.

With everything from articles and videos to podcasts, there's nothing you can't find here. Not forgetting our amazing support team, who are always on hand to help with any questions.



7 Making the most of Force24

Ongoing Training

Now you're onboarded and engaging your contact base, there's no stopping you. Our ongoing training is always available if you want to try something new, are looking for advice, or want some help getting to grips with a new feature.

If you have new starters that need a helping hand, we've also got it covered!

Our training team are with you and happy to help wherever they can. Simply book in a session [here](#).

Your CSM

Your CSM will continue to be with you throughout your time at Force24. Please contact them if you have any questions around best practice.

They can also take you through our **accelerator packages**, which help you to elevate your marketing by taking the work out of your hands and into the trusted hands of our professional services team. This can include creative, data, journey creation, content writing, strategic planning and much more. Find out more [here](#).

Best Practice Videos

Creating Great
Email Content

Deliverability:
Best Practices

How to Segment
Your Data

More Video
Tutorials

Helpful Articles

How to Build
an Email with
Force24

How to Build
and Publish a
Microsite

How to Build a
Journey

Accessing
Webinar
Recordings

8 Checklist

- 1 Complete GDPR Documents
- 2 Send brand guidelines
(if you have purchased branded snippets)
- 3 Set-up your email and microsite domains
- 4 Set up tracking and data capture
- 5 Complete initial data upload

Thanks and chat soon

We think you are going to love your time with Force24.
If you need us, we are just 2 minutes away on the chat
facility at the bottom right of your platform.

We are always looking at ways to enhance the customer
experience here at Force24, so please do share your
feedback with our team whenever you can.

Force24™