Account Setup Checklist

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To help with your account setup, please email your Customer Success representative the following:

Completed User Worksheet

- This Worksheet assists your Customer Success representative in setting up the initial Users and Contacts in your account
- Additional Resources:
  - Understanding User Roles and Contacts (http://guide.inmotionnow.com/help/onboarding-users-vs-contacts)
  - User and Contact Worksheet (http://guide.inmotionnow.com/help/user-contact-worksheet)

Creative Brief Form(s)

- This includes any existing Creative Briefs or Request Forms your organization is currently using, if still applicable
- Additional Resources:
  - eBook: Perfecting the Perfect Project Launch (http://guide.inmotionnow.com/help/perfecting-perfect-project-launch-jl)
  - Sample Creative Brief (http://guide.inmotionnow.com/help/sample-creative-brief)

Sample Content *(optional)*

- This includes examples of frequently routed creative assets to use during Team Trainings

Sample Process Documentation *(optional)*

- This could include a diagram or document describing your process for:
  - Requests
  - Projects (Tasks and Timelines)
  - Approval Routing