



MemberMouse Migration Quick Start - Discovery Sheet

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01

Migration Assessment

This discussion will vary based on a number of factors.

Below are listed the basic questions to help guide the discussion and assessment of the migration specifics.

- What service are you migrating from?
- Do you have free members and / or paid members?
- If paid, do you have rebilling subscriptions?
- If paid, what payment processor(s) are you using? Will this stay the same for your MemberMouse site?
- What member-related assets (pages, posts, downloads, videos) will you be keeping/transferring?

General Notes:

02

Product Offering

Please define the product offering(s).

If you have ideas for how to break up your offering into Memberships, Bundles, etc you can enter them in the table below.

If not, then add a description in the General Notes area including:

- What you would like people to be able to purchase?
- For how much?
- How often they would pay you?
- Will there be plans that people can upgrade or downgrade between?
- Would you want them to be able to purchase multiple products?
- Will there be a free signup available?

Memberships

Name	Subscription Type	Price	Description
Name	Subscription Type	Price	Description
Name	Subscription Type	Price	Description

Stand-alone Products

Name	Subscription Type	Price	Description
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Bundles (combined products)

Name	Subscription Type	Price	Description
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General Notes:

03

Alerts and Triggered Emails (Push Notifications)

We will configure some standard push notifications for you to get you started. We recommend that at the minimum you send your new members

- a Welcome Email
- a receipt
- a notice if their account is overdue

We will also configure a sample employee / admin notification.

Welcome Email draft:

Please write a draft of your welcome email.

If you do not have a draft yet, we will create a generic welcome message.

If you do not want a welcome email, please note that here instead.

Receipt draft:

Add any additional messaging you'd like on the receipt.

By default, all of the order information will be included.

If you do not want a receipt, please note that here instead.

Payment failed / account overdue notice:

Add any additional messaging you'd like on the email sent to members when a payment is unsuccessful.

By default, a sentence telling them that their account is overdue as well as a link to allow them to update their billing information is included.

If you do not want an account overdue notice, please note that here instead.

Employee / Admin notification:

Trigger (ex Product purchased, Account Overdue, Payment Received)	Sent to (email address)	Message
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04

Employee Accounts

You may have secondary email addresses that you would like triggered emails to be sent from. These will need to be configured as employee accounts. Please provide the following information for any [employee accounts](#) that you'd like us to create.

Display Name	Real Name	Email	Role
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General Notes:

Add special notes and comments here...

05

Core Pages

We will configure all 11 core pages for you and make sure that they are working as expected. There are 4 pages that allow for additional customization (Checkout, Confirmation/Thank You, Member Home and Save-the-Sale/Cancel). Please write down the messaging or add-ons you would like on these pages.

05a

Checkout

Would you like to include any [custom fields](#) on your checkout page?

Custom Field Name	Type	Appears on the My Account page?	Required?
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General Notes:

Add special notes and comments here...

05b - Core Pages

Confirmation / Thank You

By default the confirmation page contains all of the relevant order information.

What else would you like your new members to see directly after they checkout?

If there is additional general messaging you'd like included on the confirmation page, please write it in the General Notes section.

Also if there is a special offer or additional product information you'd like to put on this page, you can include it in the table below.

Special Offers

Special Offer Product Name	Is it a coupon?	Is it meant to be an upsell?
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Additional Links or Messaging

Product or Page Name	Description	
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General Notes:

Add general confirmation messaging and other notes here...

05c - Core Pages

Member Home Example

By default the member home page is a blank slate for you to create what you'd like or insert a template provided by your theme.

We will provide an editable example including the common elements that customers like to have on their member home page.

General Notes:

05d - Core Pages

Save-the-Sale / Cancellation

By default, the Save-the-Sale page has generic messaging and a coded link to allow members to cancel their membership. Members arrive at this page by clicking the 'cancel' link on the My Account page.

What would you like to say to members right before they finalize their cancellation? Write that in the General Notes area.

Would you like to make a special offer to them to "save the sale" and keep them from canceling?

Special Offers

Special Offer Product Name	Is it a coupon?	Is it meant to be an downsell?
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General Notes:

Add general cancellation messaging and other notes here...

06

Sales Page

We will configure one sample sales page for you.

Would you like it to be a product landing page or a membership options page?

Or did you have something else in mind, like a free member signup form?

If you have text that you'd like on the page, add it in the General Notes area. Otherwise, we'll supply stand-in text for you to replace.

Example 1:

Homepage > Membership Options > Checkout > Confirmation

Example 2:

Product Landing page > Checkout > Confirmation

General Notes:

Add special notes and comments here...

07

Member Content

We will provide examples (up to 3) of protected content pages for your members.

If you have pages, posts, categories or content already created that you'd like us to protect, please fill out the table below.

If you do not currently have anything, we will create generic pages or posts to use as examples.

Post type	Categories	Protection rules	Comments
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General Notes:

Add special notes and comments here...

08

3rd Party Integrations

Please fill out the 3rd party Email and Payment integrations you'll be using.
If you will be using iDev affiliate, we will configure that as well.

Email Integration Name	Comments
Payment Integration Name	Comments

General Notes:

Add special notes and comments here...