

Phase 2 – Cloud Configuration - Checklist v2026

Purpose:

This phase will acquire access to all raw data to configure and/or verify the accuracy of data collection mechanisms, services, and software.

The generated report will include any digital marketing campaign results, standard analytics reports, baseline reports, Phase(3) recommendations, configuration, and cost.

Client: _____ Date: _____

PHASE 2 – TASK 1: SETUP CLIENT INFRASTRUCTURE

- ☐ Add Client in CMS [<https://7thpowerinc.com/client-intake-form.aspx>]
- ☐ Move Client in CMS to “0_Prospective Clients”
- ☐ Create Client Folder in Dropbox in “0_Prospective Clients”

PHASE 2 – TASK 2: SITE CONTROL

- ☐ 0 – Password List: ☐ YES ☐ NO ☐ Access WHO: _____
- ☐ 1 – Control Domain: ☐ YES ☐ NO ☐ Access WHO: _____
- ☐ 2 – Control DNS: ☐ YES ☐ NO ☐ Access WHO: _____
- ☐ 3 – Control Web Hosting ☐ YES ☐ NO ☐ Access WHO: _____
- ☐ 4 – Control Email Hosting ☐ YES ☐ NO ☐ Access WHO: _____
- ☐ 5 – Control Site Access ☐ YES ☐ NO ☐ Access WHO: _____
 - ☐ WordPress ☐ Other: _____
 - Web Design: _____

PHASE 2 – TASK 3: WEBSITE DATA

- ☐ 0 – Change client status in CMS
- ☐ 1 – Add Project File structure to Client in CMS

☐ 2 – Move Client Dropbox Folder to “1_Cradle - Infant” Section¹

☐ 3 – CompanyName@gmail.com ☐ Skip _____

☐ 4 – Google Analytics

☐ Setup Analytics

☐ Request Access to GA-4 (If GA4 Account already exists)

☐ Link to 7thpowerinc@gmail.com (Add at Account and Property level)

☐ Link to ga4-7thpower-servacct@thpower.iam.gserviceaccount.com
as 'viewer' (Add at Account and Property level)

☐ 5 – Set up Google Tag Manager

Account name: _____

☐ 6 – Set up Key Events/Events ☐ Skip _____

Key Event 1: _____

Key Event 2: _____

Key Event 3: _____

☐ 7 – Build Google Looker GA4 Dashboard(s)

7thPower ☐ Std ☐ ePro

☐ 8 – Configure Webmaster Tool(s) ☐ Skip _____

Google SC ☐ Verified ☐ Not Verified **WHO:** _____

☐ Request Access to GSC (If GSC Account already exists)

☐ Link to 7thpowerinc@gmail.com

☐ Link to ga4-7thpower-servacct@thpower.iam.gserviceaccount.com

as Restricted

Bing WMT ☐ Verified ☐ Not Verified **WHO:** _____

☐ Request Access to BWMT (If WMT Account already exists)

☐ Link to 7thpowerinc@gmail.com

☐ 9 – Link Google Search Console to Google Analytics ☐ Skip

☐ 10 – Add Google Tag Manager code to the Client's Website ☐ Skip

Local

☐ 11 – Claim Google Business Profile ☐ Skip **WHO:** _____

Username: _____

Password: _____

a. Owner / Doctor ☐ UTM ☐ Verified ☐ Link to 7thpowerinc@gmail.com

b. Business / Practice ☐ UTM ☐ Verified ☐ Link to 7thpowerinc@gmail.com

¹ Do this step in the web version of Dropbox

- ☐ **12 – Claim Bing Places for Business Profile** ☐ Skip **WHO:** _____
 Username: _____
 Password: _____
- c. Owner / Doctor ☐ UTM ☐ Verified ☐ Link to 7thpowerinc@gmail.com
 d. Business / Practice ☐ UTM ☐ Verified ☐ Link to 7thpowerinc@gmail.com
- ☐ **13 – Yelp Profile** ☐ Skip **WHO:** _____
 Username: _____
 Password: _____
- a. Business ☐ Verified ☐ Link to [7th Power Yelp](#)

Ads

- ☐ **14 – Search Engine Campaign(s)** ☐ Skip _____
- a. Google Ads Account ID _____ ☐ Skip
☐ Link to 7thpowerinc@gmail.com (Manager)
- b. Microsoft Ads Account ID _____ ☐ Skip
☐ Link to 7thpowerinc@gmail.com (Manager)
- ☐ **15 – Link Google Ads & Google Analytics** ☐ Skip _____
- ☐ **16 – Link Google Ads & Search Console** ☐ Skip _____
- ☐ **17 – Update Client “Login” Excel sheet** ☐ Skip _____

PHASE 2 – TASK 4: BUSINESS DATA

- ☐ **Accounting Software**
☐ (_____)
 Username: _____
 Password: _____
- ☐ **Business Management Software**
☐ (_____)
 Username: _____
 Password: _____
- ☐ **Appointment Software**
☐ (_____)
 Username: _____
 Password: _____
- ☐ **Reminder Software**
☐ (_____)
 Username: _____

Password: _____

☐ **Survey**

☐ (_____)

Username: _____

Password: _____

☐ **Review Software**

☐ (_____)

Username: _____

Password: _____