

Launch Kit

Getting ready to launch

3 checklists to go over before launching your platform and projects

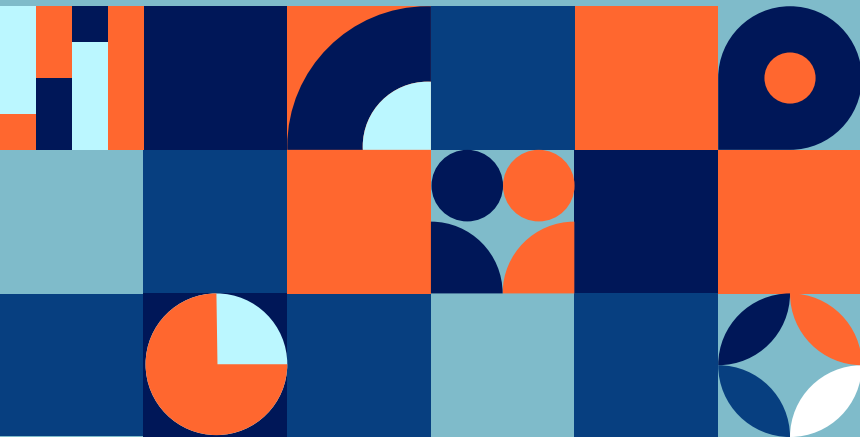




Table of contents

Introduction	1
Platform settings - checklist #1	2
Project settings - checklist #2	6
Communication strategy - checklist #3	9
Additional pre-launch preparations	12

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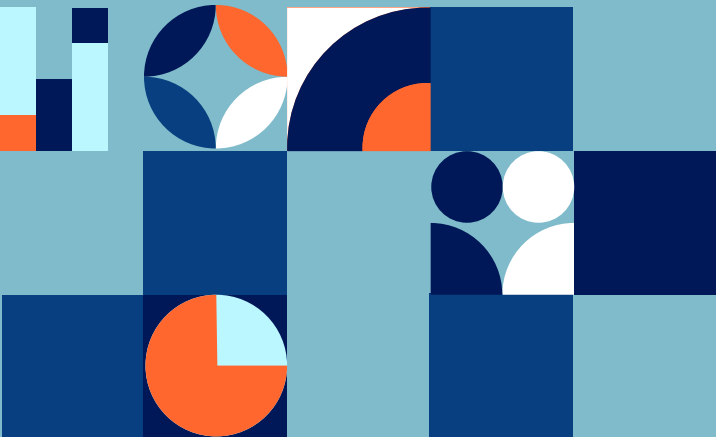
Introduction

Before you put your platform or project out there, it's important to go over these important settings and assess whether you're ready or not to get your platform going and launch your first participation projects. The goal of this document is to assist you with this assessment and **help you make sure you didn't forget anything while setting up your first project(s)** and that you'll make the best out of your platform.

This document provides you with **a set of checklists** to go over your **platform general settings** as well as your **projects settings** but also ensure that you thought of an effective **communication** campaign to raise awareness around your projects and maximise the engagement.

Finally, this document also provides you with a **list of tips and tricks to effectively manage your projects after their launch** and throughout their lifecycle.

Platform settings checklist #1





Go over this platform checklist to make sure you didn't forget about any general platform settings. Most of those settings will remain the same regardless of the ongoing projects so make sure you took all the potential future use cases into account. Please also take care of the short list of information you need to send to support@citizenlab.co during onboarding.

The essential launch steps in the admin Settings:

1

Adapt your platform's look and feel to your visual identity by changing the platform colours, logo and banner image

Go to the "[Homepage and style](#)" tab of the "Settings" section.

Note: if you have a premium subscription you can also customize your platform's font. Contact support@citizenlab.co to align on the font you want to use.

2

Customize the different messages on the homepage of your platform such as the banner (sub)title, the sections in the navigation bar or the custom section at the bottom of the homepage

Go to the "[Homepage and style](#)" tab of the "Settings" section. Note that not all copy or any CTA can be customised. Some copy is automated and linked to the action a user needs to take. Ask your advisor what's possible and what not.

3

Customize the content of the different pages of your platform

Go to the "[Pages](#)" tab of the "Settings" section. Make sure to add your organization's contact info into the "About" page (so people know who to contact) and into the "Privacy Policy" (at the start and in point 7). The content of the "Terms and conditions" can be re-used as such, but you're free to adopt it to your needs.



4

Make sure you ask the relevant user information for all your projects during the registration process.

Go to the “[Registration fields](#)” tab of the “Settings” section. You can make fields required or optional. You can also add a few words next to a field to optionally explain why you’re collecting this information.

Asking the right user information and aligning on the registration flow is **important for three reasons:**

- user registration data allows you **to categorize your users in (normal or smart) groups**. You can give those users/groups specific rights to take certain actions or see certain projects.
- registration fields are asked platform-wide, i.e. to every user that registers on the platform. A field that would be added later in the process (e.g. after x users are already registered) **wouldn’t automatically be shown to users that are already registered**

Note: If you use an embedded survey in your project (phase), you could always ask extra (user) info inside that survey. Or if you collect input using the ‘input form’, you can use the fields in that form to ask for extra (user) info.

- user registration data will allow you to properly **process and interpret the input you’ll collect**.

5

Add your custom favicon

You can simply add a favicon (the icon that appears in a browser tab) by going to www.yourplatformurl.com/admin/favicon. For SEO reasons we recommend to only do this once and don’t change your favicon multiple times.

6

Link your platform to your organisation’s website

Add your organisation url it in the “[General](#)” tab of the “Settings” section.



Contact support@citizenlab.co to:

7

Customize your platform's URL

Follow the different steps described in this [support article](#). Make sure not to externally the 'old' url if you still plan to customize it.

8

Personalise the “reply-to” email address for the automated email notifications

Even though platform users are not supposed to reply to automated emails sent from the platform, such as invitations, weekly overviews, updates on projects, etc., sometimes they do. In that case it is convenient that it reaches you and not CitizenLab. So please pass on your general reply-email address (*info@...*, *hello@...*, *communication@...*) to support@citizenlab.co. We will add it for you in our back-end.

9

Get access to our Typeform professional account

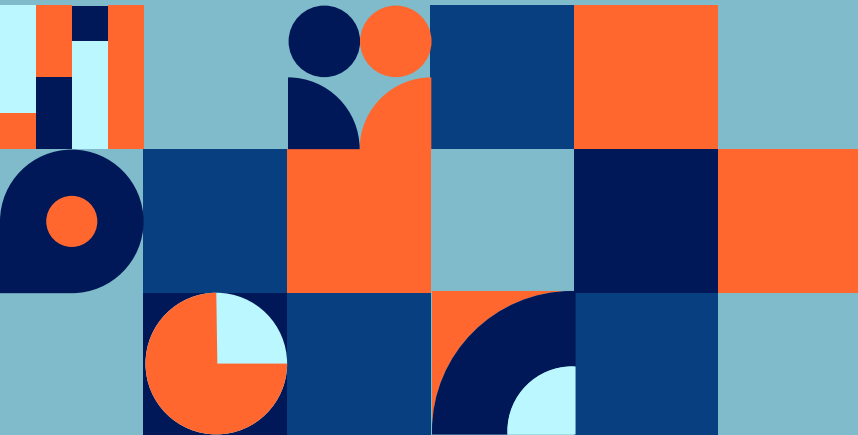
For your advanced surveys, we give you one professional Typeform access per platform. Send the email address to which we should send you the invite to support@citizenlab.co.

10

Get access the Google Analytics data of your platform

We can give you access to this data if you send your Google Tracking ID to support@citizenlab.co (here is a [support article](#) explaining you how to retrieve your tracking id).

Platform settings checklist #2





Before launching your first projects please go over this checklist to make sure you didn't miss any important steps you can take upfront .

1

Make sure to grant access to your project to the right groups of users if needed

Per project, you can set the access rights, i.e. viewing and contribution (vote, comment, input) rights. Go to “Access rights” tab of your project’s settings page to set the correct access rights. In the same tab you can decide if you want to assign a project manager to your project. **Check out point 4 in the Platform Settings checklist** above to be sure the info you need is asked during the platform-wide registration flow.

2

Create an extra user account to test access and viewing rights of your project(s)

If you are an admin or project manager that’s using the platform regularly, here’s is a useful trick before you launch your project: register with an extra, personal account, but don’t give this account admin-rights. Put this account into a (normal or smart) group. This will allow you to test out the access or group settings without seeing all the buttons an admin always get to see.

3

Add a (short) description to each phase of your project

Go to the “Timeline” tab of your project’s settings page and make sure to add information in each phase, so people know what to expect. Don’t leave the description of a timeline phase empty.



4

In any ideation project, customize the idea submission form (“Input form”)

You can do so by going to the “Input form” tab of your project’s settings. The input form is very powerful tool that allows you to edit the fields in the form a user gets to see when posting an input. The customisable form allows you to better describe what input you’re expecting from the users.

5

In any ideation project, customize the tags and statuses

The platform comes with some built-in tags and statuses, but you can change, delete or add your own. Go to the “Tags” tab of your project’s settings page to customize your project tags and to the “Input Manager” to add and edit statuses.

6

If you embed a Typeform survey in your project, make sure you add a ‘hidden field’ to be able to link the survey answers with your platform users data

A Typeform survey is ‘embedded’ on the platform, which means it is not automatically linked to all the dashboard data of your platform. Yet, it is possible to link your survey results to the registration data of the platform. You need to add a ‘hidden field’ to your Typeform survey and the user ID’s of the users who answer the survey will be automatically added to the survey answers. You can find more detailed information on how to do it in this [support article](#).



For more information and inspiration on how to set-up a proper participation project, check our [blueprint for project creation](#)

Communication strategy checklist #3





Now that your platform is set-up and that your first consultation is ready to be launched you need to make sure the participants will be able to easily access it. Go over this checklist to make sure you have an effective communication strategy in place.

Make other websites refer to your platform

Make sure to add links to the platform on the other websites of your organisation and of your partners. A simple button or a hyperlink is already great. An effective way to promote your platform on other websites is to embed a widget. You can find out more information on how to set-up a widget in this [support article](#).

Collect email addresses of people you want to invite to the platform

You can directly import email addresses into your platform and send out invitations via our invitation feature (remark: make sure that you have the right to reuse those email addresses from a GDPR point of view). You'll find out more information about our invitation feature in this [support article](#).

Send follow-up emails on a regular basis

It's important to regularly reach out to the participants to update them on the progress of your projects. The platform has built-in email notifications to which users can opt-in, but also invite your participation pro-actively to participate in the new participation projects or phases. You can directly send email campaigns from your platform by using the emailing feature, i.e. the "Emails" tab in the admin panel.

Use a multitude of channels to communicate around your platform

It is important to determine the right channel for the right target audience so make sure to reflect on which channel will be most effective to reach which group of your audience. A combination of multiple (offline and online) channels is often the key.



Point of attention when communicating on social media:

- To which page of the platform should the link of your post lead? What action do you want the participants to take on your platform? Define a very clear message, with one call to action.
- Illustrate your message with an attractive visual. This should be a high-quality image with as little text as possible and highlighting the call to action.
- Think about the time of day before posting. Avoid posting late at night or on calm days like Friday or Saturday.



For more information and inspiration on how to set up a proper communication strategy, read our [communication guide](#)



Additional broader pre-launch preparations

While setting-up your platform and designing your first consultations, don't forget to reflect on your broader participation strategy and to define how your new platform will fit into it. A successful participation requires clear objectives and an effective internal organization.

Don't forget to check the following resources to make sure you're fully ready to launch your platform:

- The **eParticipation canvas** to define your broader participation strategy.
- The **internal organization guide** to help you set an effective organizational structure.
- The **blueprint for project creation** to help you design your participation projects.
- The **communication guide** to design powerful communication campaigns and raise awareness around your platform and projects.



The digital democracy toolbox

www.citizenlab.co
hello@citizenlab.co