

Post-Migration Technology Checklist

For practices and small businesses with a new or recently refreshed tech stack

Prepared for the office manager or operations lead taking ownership of a business's systems after a website, social, or platform transition. The items below are the gaps we most often find creating silent friction 60 to 90 days after a migration. Work through it in an afternoon.

■ FRONT DOOR AND FIRST IMPRESSIONS

- ☐ Contact and new-member inquiry forms have been tested in the last week, and submissions were received
- ☐ Inbound leads from the website reach more than one inbox, so nothing gets missed when someone is out for a week
- ☐ Google Business Profile hours, address, phone, and services match the website exactly
- ☐ The old website redirects cleanly to the new one, including old blog posts or pages people may have bookmarked
- ☐ Website analytics were reinstalled after the refresh, so inquiries and visits are still being tracked
- ☐ Social media links on the site point to current, active accounts

■ NEW MEMBER ENROLLMENT WORKFLOW

- ☐ The path from "interested" on the website to "enrolled" is written down somewhere
- ☐ New customer information flows into the main system once, without being re-typed into multiple tools
- ☐ New members receive a welcome sequence (email, onboarding info, first-visit link)
- ☐ Payment setup happens during enrollment, not as a separate follow-up that gives new customers a chance to change their mind
- ☐ Membership or customer status (active, paused, cancelled) lives in one place the team trusts

■ SUBSCRIPTIONS AND COST HYGIENE

- ☐ Every recurring charge on the business card matches a system in active use
- ☐ No two tools are paying for the same function (e.g. two schedulers)
- ☐ Annual renewals are on a calendar so nothing auto-renews unnoticed
- ☐ Subscription costs are reviewed on a set schedule (quarterly or annually), not only when a bill seems too high

If several boxes are unchecked, that is the point. These gaps rarely break things on day one. They surface slowly as missed messages, slow enrollments, duplicate work, and subscription bloat, usually over the first few months after a migration. Catching them early keeps the transition clean.

NEXT STEP

Found gaps worth fixing? Get a free 30-minute review.

Our **Free Technology Review** gives you a focused outside look at your stack and a short written recap you can act on. Built for owners and office managers, not tech teams.

WHAT YOU GET

- ✓ A shared look at what is connected, what is not, and where the risk lives
- ✓ Three to five specific recommendations in plain language
- ✓ A priority ranking, so you know what to tackle first
- ✓ A short list of what is working well, so you know where not to spend time
- ✓ No deck, no pitch at the end, just the recap to keep

HOW IT WORKS

- 1 Book a 30-minute call at a time that works for you
- 2 We walk through your current setup together, no prep required
- 3 You receive your written recap within two business days

REQUEST YOURS

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Request a Free Technology Review online

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Or email us anytime