



to



Are you ready to transition from imago? We have created a checklist to help you make this a fast and smooth process.

SETUP ACCOUNT

- Open Account
- Invite Team
- Review account settings
- Signup for marketing phone# *(optional)*
- Notify CS to update your account

Role	H&H Resource
Owner	Customer Service
Owner/Admin	Customer Service
Owner	Customer Service
Owner/Admin	Customer Service
Owner	Customer Service

SALES STRATEGY

- Decide what you will sell on imago first
- Decide which Journeys you will use
- ID which marketing campaigns to copy
- ID which price lists to copy
- Create any promotions you'll offer

Role	H&H Resource
Owner	Customer Service
Owner/Admin	Customer Service
Owner/Admin	Customer Service
Owner/Admin	Customer Service
Anyone	Customer Service

SALES + MARKETING

- Setup your branding
- Upload any marketing images
- Setup your marketing campaigns
- Setup your price lists

Role	H&H Resource
Anyone	Design Center
Anyone	Design Center
Anyone	Design Center
Anyone	Design Center



to



SETUP PROJECTS

- Create Organization Pages
- Create Test Project
- Load Prospects
- Submit test as a customer
- Make any adjustments and save preset
- Create first projects using preset

Role	H&H Resource
Anyone	Customer Service
Anyone	Customer Service
Anyone	Customer Service
Anyone	Customer Service
Anyone	Customer Service
Anyone	Customer Service

If you want to learn more about how to do each of these things, click the URL below to check out the Imago Help Center-

[Imago-HelpCenter-VideosAndArticles](#)

Have More Questions? Let's talk: customerservice@hhcolorlab.com

We are so thrilled you are starting this journey. Don't hesitate to let us know how we can help make sure it is a happy one!