

Implementation and Launch Guide

A practical path from discovery and configuration to staff readiness and continued support.

01 Build a plan around your opening date

A successful launch begins with clear decisions and ends with staff who can run their daily work. This guide explains the stages of a Cogran implementation and the inputs, reviews, and approvals your organization should plan to provide.

Set a realistic calendar

Cogran's current website describes a typical implementation of one to six weeks. Larger or more complex projects may need a longer schedule, particularly when several departments, historical records, integrations, or formal acceptance steps are involved. Agree the dates for your scope before announcing public availability.

Stage	Work product	Ready to move on when
Discovery	Agreed workflows and launch scope	Owners, dependencies, and decisions are clear
Preparation	Program content and approved data files	Inputs are complete enough to configure
Configuration	A working system for review	Policies and workflows are represented correctly
Training and testing	Practiced staff and test evidence	Critical scenarios pass
Launch	Approved cutover and support plan	Data and operational owners authorize release
Continued support	Issue follow-up and operating ownership	Staff know how to get help and manage changes

Agree the first launch. A phased project can start with one season, location, or workflow. Record how customer accounts, payments, schedules, and reports will work while more than one system remains in use.

02 Prepare and configure together

Your first planning conversation

Bring your registration calendar, service areas, current pain points, sample forms and reports, fee policies, and approximate record volumes. Identify the people who can approve operational, financial, and access decisions. Your Cogran contact can then help turn these inputs into a practical work plan.

What your team supplies

Organize programs by registration period and include dates, times, locations, capacity, eligibility, instructors, and prices. Add facility availability rules, membership terms, required forms, refund policies, account codes, branding, and customer-facing instructions. Provide approved files for any migration in scope.

What Cogran helps set up

Within the agreed scope, Cogran helps configure the public Front Page, programs, forms, fees, staff permissions, and connected workflows. Setup includes review conversations so your team can try the configuration and identify changes before launch. A trial import gives you a chance to validate data before the final move.

Decision area	Your approval should cover
Registration	Eligibility, capacity, waitlists, and opening/closing dates
Forms	Required answers, field wording, and who can view responses
Payments	Stripe connection, accepted methods, deposits, and fee treatment
Operations	Rosters, groups, attendance, reservations, and member access
Communications	Confirmation text, sender details, recipients, and enabled reminders
Finance	Account mappings, balances, refunds, exports, and reconciliation

Keep integrations visible

Name each external system and define the information to exchange, the method, frequency, owner, and acceptance test. A usable export does not by itself establish an automated integration. Custom work, SSO, hardware, and specialized reporting should have explicit scope, cost, and delivery dates.

Use the Software Migration Checklist to manage source files, mapping, trial imports, exceptions, and final reconciliation.

03 Train people in their actual work

Cogran's training approach supports key staff who can teach colleagues, reinforced by online sessions, written help, and videos. Agree the participants, session schedule, materials, and any additional training needs in your plan.

Role	Practice before launch
System administrator	Manage roles, review settings, update content, and find help
Program or camp staff	Set up a session, review forms, manage groups, and communicate
Front desk and attendance staff	Assist a household, take payment, record attendance, and handle an exception
Facility or membership staff	Review a booking or member record, apply rules, and check access
Finance staff	Review charges, balances, refunds, fees, and reconciliation reports

Turn each requirement into a test

Record the scenario, tester, expected result, actual result, evidence, and any defect. Ask your staff to run the process themselves. Include mobile customer use and the devices staff will use at desks, pools, fields, and program locations.

- ☐ Browse, create a household, register multiple participants, and receive confirmation.
- ☐ Exercise a restriction, waitlist, discount, payment, cancellation, and partial refund.
- ☐ Check a facility conflict, membership date, or other required operational rule.
- ☐ Verify roster accuracy, attendance, sensitive-data permissions, and financial output.
- ☐ Retest corrected defects and record any remaining accepted exceptions.

Rehearse the busy moment. Walk through registration opening or the first morning of camp. Establish who helps customers, who investigates a payment issue, and who makes a decision if a critical workflow fails.

04 Launch with clear ownership

Complete the readiness review

- ☐ Public content, prices, dates, forms, and links approved.
- ☐ Data and balances reconciled; required tests passed.
- ☐ Staff accounts, devices, payment equipment, and connectivity checked.
- ☐ Customer instructions and any downtime notice prepared.
- ☐ Named launch contacts and escalation route distributed.
- ☐ Final import, recovery approach, and go/no-go authority agreed.

Monitor the first real activity

After opening, review the first registrations and confirmations, verify staff can find the records they need, and check the first financial reconciliation. Keep an issue list with impact, owner, and next action. A short daily review during the initial operating period can help separate urgent corrections from later improvements.

Know how to get help

Cogran provides a dedicated account contact, personal training, and helpdesk resources. The current published support description includes a four-hour response target and 24-hour support availability. Confirm channels, coverage, escalation, and any purchased support scope in your agreement. A response target is not a promise that every issue will be resolved within that time.

Prepare for your next season

Once daily work is stable, review staff questions and update your local instructions. Practice copying a program or season and check the new dates, prices, capacity, forms, and messages before publishing. Review staff access as seasonal employees join or leave.

Launch approver and date

Primary support route and escalation contact

Planning reference: [Switching to Cogran](#). Support details: [Guides and answers](#).