

Swell Launch Overview

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Training material for a fictitious SaaS company to onboard cross-functional teams to a standardized launch process. This sample demonstrates process documentation, role definition, and lifecycle explanation for a technical audience.



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1. Aim of this Document

This document helps new members of the Swell launch team understand:

- How to onboard new clients onto the Swell platform.
- The actors who contribute to a successful Swell launch.

2. Overview of a Swell Launch

To launch a new client website on the Swell platform (Swell site), the Swell launch team collaborates with the client team to:

- Customize the Swell platform to meet the client's legal and branding requirements
- Ensure that the Swell platform can exchange data with the client infrastructure.

The Swell launch process starts when the client signs a contract with Swell (kickoff). It ends when we release the client's Swell site to a production environment (general availability).

A typical Swell implementation takes two to four months from kickoff to general availability. Variables that impact the launch timeline include:

- The client turnaround time for delivering their branding elements.
- Client procedures. Example: Running a security scan or a penetration test before going live.

3. Phases of a Swell Launch



We roll out new Swell sites in six to eight phases:

1. **Program Definition:** The client and Swell launch teams work together to define how to customize the Swell platform.

2. **Implementation and Quality Assurance:** The Swell launch team customizes the platform and tests the Swell site in a development environment that's only accessible to the Swell launch team.
3. **Systems Integration:** The client and Swell launch teams test that the Swell platform and the client infrastructure can connect and exchange data.
4. **User Acceptance Testing:** The client team tests the new Swell site in a staging environment to ensure that the new Swell site meets their requirements. The staging environment is only accessible to the client and the Swell launch teams.
5. **Security Assessment (optional):** The client team runs penetration and vulnerability tests on the new Swell site.
6. **Stabilization (optional):** The Swell launch team monitors the Swell site to ensure its smooth operation and resolves any issues before releasing the site to a production environment.
7. **Deployment:** Upon client sign-off, the Swell launch team deploys the Swell site to the production environment to make it available to end users.
8. **Maintenance:** The Swell launch team closes the project and hands the client over to the Swell maintenance team.

4. Actors and Responsibilities

	Program Definition	Implementation and Quality Assurance	Systems Integration	User Acceptance Testing	Security Assessment	Stabilization	Deployment	Maintenance
Client Launch Team								
Client Project Manager	✓			✓				✓
Client IT Manager	✓	✓			✓			
Client Legal Counsel	✓							
Client Brand Manager	✓							
Swell Launch Team								
Account Manager	✓							✓
Launch Specialist	✓		✓					
Development Manager		✓		✓				
Designer	✓							
BI Analyst	✓	✓						
Legal	✓							
Copywriter	✓							
Systems Analyst		✓		✓				
IT Analyst			✓		✓		✓	
QA Analyst		✓		✓				
Client Success Coordinator								✓
Other Actors								
End User								✓

A successful Swell launch requires the right people on the client's team and the Swell launch team.

4.1. Client Team

4.1.1. Client Project Manager

The client's project manager is the point of contact between the client and the Swell launch teams. As the owner of the Swell project on the client side, they:

- Gather customization requirements and communicate them to the Swell launch team.
- Sign off on the requirements and creative services.
- Ensure the timely execution of client tasks.

- Liaise between the Swell launch team and the client team.

4.1.2. Client Information Technology Manager

The client's information technology (IT) manager ensures that the client and Swell platforms can exchange data. With their team, they:

- Participate in the project kickoff and the data exchange kickoff meetings.
- Set up sFTP and PGP encryption.
- Whitelist the Swell IP addresses.
- Provision SSL certificates.
- Implement the Swell APIs.

4.1.3. Client Brand Manager

The client's brand manager:

- Reviews the designs and copy provided by the Swell launch team.
- Signs off on creative services.

4.1.4. Client Legal Counsel

The client's legal counsel:

- Reviews the designs, copy, and other creative materials.
- Signs off on the legal terms that appear on the Swell site.

4.2. Swell Launch Team

4.2.1. Account Manager

The account manager handles client satisfaction. They:

- Hand over the account from sales to the Swell launch team.
- Introduce the Swell launch team to the client.
- Conduct health checks and client satisfaction surveys.

4.2.2. Launch Specialist

The launch specialist ensures that the client and Swell launch teams follow the launch process and complete tasks on time. They:

- Liaise between the client and Swell launch teams.
- Organize the kickoff meetings and status calls.

- Gather requirements from the client project manager.
- Guide the client through user acceptance testing.

4.2.3. Development Manager

The development manager ensures that the Swell launch team delivers the new site on time and on budget. They:

- Organize an internal kickoff meeting.
- Deliver and maintain the project plan.
- Assign resources.
- Ensure the timely implementation of the Swell site.

4.2.4. Designer

The designer implements the client's brand. They:

- Obtain style guides, logos, and other creative resources from the client.
- Deliver creative services under the direction of the client's project manager, brand manager, and legal counsel.

4.2.5. Business Intelligence Analyst

The business intelligence (BI) analyst handles the Swell site performance dashboard. They:

- Implement the Swell site performance dashboard.
- Train the client team in using the dashboard.
- Deliver dashboard documentation.

4.2.6. Legal

When clients request changes to the standard terms and conditions for Swell sites, the Swell legal team must review and sign off on all proposed changes.

4.2.7. Copywriter

The copywriter customizes the default Swell copy to match the client's tone, voice, and jargon across:

- The Swell site.
- Emails.
- Customer support templates.

4.2.8. Systems Analyst

The systems analyst:

- Configures the Swell platform following client requirements.
- Supports the client IT team during their implementation.

4.2.9. Information Technology Analyst

The IT analyst handles the hosting and IT infrastructure of a Swell site. They:

- Manage the data exchange infrastructure (sFTP, PGP).
- Set up SSL certificates.
- Whitelist the client IP addresses.

4.2.10. Quality Assurance Analyst

The quality assurance analyst ensures the quality of a Swell implementation. They:

- Customize the generic test plan.
- Test the Swell site.
- Log defects.
- Follow up on defects and ensure their resolution.
- Report open defects to the development manager.

4.2.11. Client Success Coordinator

Responsible for customer care support, the client success coordinator assists end users with site inquiries.

4.3. End Users

End users are the client's customers. They are the people who use the Swell site.

5. Next Steps

To learn more about the Swell launch process, read:

- [Swell Launch Guide](#)
- [Creative Services Process](#)
- [Data Exchange Process](#)
- [Hosting Operations Process](#)