

Enterprise Onboarding Guide

A staged implementation path for brands, regions, teams, identity, governance, and reporting.

Principle

Start with the smallest useful structure, validate it with one brand or region, then expand. Identity and governance controls remain dormant until tested and approved.

Phase 1 - Discover

- Confirm brands, regions, teams, owners, administrators, and Enterprise channel requirements.
- Inventory channels, connected-account ownership, expiring credentials, content assets, API clients, MCP agents, and reports.
- Map draft, approval, scheduling, publishing, analytics, retention, and offboarding workflows.
- Confirm identity provider, directory, domains, network restrictions, billing, support, and rollout dates.

Phase 2 - Design

- Choose an individual, global-brand, regional, multi-brand, agency-group, or franchise template.
- Name workspaces and assign ownership boundaries.
- Define permission groups, approvers, reusable policies, presets, Brand Kits, and notification rules.
- Agree reporting dimensions such as brand, region, cost centre, executive, or client.

Phase 3 - Configure

- Create workspaces and connect channels without sharing passwords.
- Verify domains and enter WorkOS organization, SSO connection, and directory identifiers.
- Configure group mappings, MFA, session, IP, retention, audit, and webhook policies.
- Prepare migration, support routing, reports, billing allocation, and rollout items.

Phase 4 - Validate

- Test SSO and directory lifecycle with non-owner users before enforcement.
- Test draft, approval, schedule, publish, failure, analytics, export, and audit flows.
- Confirm webhook signatures, connection expiry visibility, session revocation, and recovery access.
- Validate one pilot workspace before wider rollout.

Phase 5 - Launch and operate

- Complete administrator and publisher training.
- Activate only purchased and approved controls.
- Publish support and incident contacts.
- Review access, tokens, retention, status history, usage, and adoption quarterly.

Go-live acceptance

Decision	Owner	Status / notes
Organization design	Customer	
Identity and access	Customer + Postly	
Publishing pilot	Customer	
Reporting and audit	Customer + Postly	
Commercial and legal	Authorized owners	

No SSO, directory, security webhook, monitoring subscription, or contractual commitment is activated merely by deploying the code.