

CLIENT LAUNCH GUIDE

From first request to confident go-live.

A practical guide to ownership, evidence, secure configuration, handover and early-life support.

CURRENT BRIEFING

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THE JOURNEY

Four stages. One visible readiness decision.

The launch record, evidence references and owners stay connected from the first request through handover.



LAUNCH PRINCIPLES

- Least data first: the public request is configuration-only.
- No access by assumption: identity and tenant context must be explicit.
- Evidence before status: each readiness claim points to a controlled record.
- No live client data until identity, storage and isolation checks pass.

STAGE 1

Request and qualify.

The public entry point is intentionally small. It starts a controlled conversation; it does not collect implementation data.

The client sends

Organisation, contact name, work email and the outcome required. The response includes an opaque SRS reference.

Do not send

Schedules, XER files, risk registers, passwords, connection strings, sensitive scheme detail or security secrets.

SOMA confirms

Product fit, intended module, deployment pattern, commercial route, client sponsor and technical administrator.

The decision

Proceed to private intake, hold for clarification, or close with the reason stated. A request is not an approved tenant.

Target response: within two working days. Keep the SRS reference in every launch email and meeting note.

STAGE 2

Complete the private intake.

The client administrator receives a high-entropy, expiring link. The intake captures configuration - not scheme files.

Configuration area	What is agreed
Organisation and tenant	Canonical organisation name, tenant slug and named client administrator.
Entitlement	Lite or Pro tier, seat count and any approved add-ons.
Identity	SSO provider and verified OIDC configuration, or the explicitly approved access pattern.
Storage	Client-controlled backend and opaque pointer fields required for that backend.
Programme	Stable programme identifier, display name and initial scheme names.

The invitation can be revoked or reissued. Corrections return through the same controlled intake lifecycle; they do not create side-channel configuration.

STAGE 3

Review and provision.

SOMA reviews the submitted configuration, resolves corrections and provisions only after the intake is approved.

Review

Check completeness, naming, entitlement, storage choice, identity details and programme structure.

Correct

Return a precise correction reason. The client updates the same intake and resubmits.

Approve

Record approval only when the required configuration and commercial authority are both in place.

Provision

Create tenant and programme context through the governed control-plane workflow. No manual filesystem shortcuts.

PROVISIONING DOES NOT EQUAL GO-LIVE

The tenant may exist while access remains withheld. Readiness evidence, UAT and the joint go-live decision are still required.

STAGE 4

Prove readiness before access opens.

Each pass is linked to an evidence reference. A checkbox without evidence is not a pass.

Identity

Named users authenticate through the approved route; role and tenant claims resolve as expected.

Tenant isolation

Positive and negative tests prove a user can reach their tenant and cannot reach another tenant.

Storage

Read, write and delete probes succeed against the approved client-controlled location without exposing secrets.

Operations

Audit events, support contacts, rollback route and incident escalation are understood and exercised.

Gate rule: no live client data until every required readiness check is evidenced and passed.

HANDOVER

Train, accept, go live and stay close.

The launch ends when the client can operate confidently and the support route is proven - not when an account is created.



MINIMUM HANDOVER PACK

- Named service owner, client administrator and support contact.
- Approved deployment and storage boundary, with evidence locations.
- User guide, training record, open-issue list and agreed workarounds.
- Go-live decision, first reporting milestone and hypercare exit criteria.

LAUNCH CHECKLIST

The short version.

- | | |
|---|--|
| ☐ SRS request reference created and retained | ☐ Tenant provisioned through the governed workflow |
| ☐ Sponsor, client administrator and SOMA launch lead named | ☐ Identity, isolation, storage and operations evidence passed |
| ☐ Deployment, tier, seats, identity and storage route agreed | ☐ Training and UAT completed with open issues accepted |
| ☐ Private intake reviewed, corrected and approved | ☐ Go-live and hypercare decisions recorded |

BEGIN

soma-risk-studio-83l.pages.dev/start

Questions: hello@somaprojectcontrols.com. Never email client files or credentials as part of the initial request.