Team SOP: Owner/Manager Monthly Maintenance Checklist

Admin · https://coreel.ai/help/team-sop-owner-manager-monthly-maintenance-checklist/

Run this once per month to keep coReel reliable across your org.

1) Account and Billing Health

- Confirm subscription is active
- Confirm plan/tier is correct for current team needs
- Review trial/inactive accounts requiring action

2) Integration Health

- Verify Google/Microsoft/Keap show active
- Reconnect any stale/failed integrations
- Confirm token refresh behavior is healthy (especially Keap)

3) User and Role Audit

- Remove former team members
- Verify Owner/Manager/User assignments
- Confirm least-privilege access is enforced

4) Extension Governance

- Confirm org extension toggle is in intended state
- Validate extension works on latest Chrome
- Re-test camera/mic permission flow

5) Data and CRM Sync Checks

- Spot-check new users are syncing to Keap correctly
- Verify required tags are applied as expected
- Review failed contact sync logs/errors

6) Template and Content QA

- Review top 3 templates for quality/compliance
- Refresh outdated scripts/CTAs
- Validate snippet/link rendering with internal tests

7) Deliverability and Performance Review

- Review sends, clicks, views, replies
- Identify low-performing subject lines/templates
- Set one optimization target for next month

8) Incident/Support Review

- Review recurring support issues
- Update knowledge base articles accordingly
- Document fixes in internal handoff/runbook

9) Change Log and Ownership

- Record what changed this month (integrations, roles, templates)
- Assign owner for any unresolved items
- Set due dates before next monthly review

Suggested Cadence

- Run on the first business day of each month
- 30–45 minutes with Owner + Manager

- Save checklist results in a shared ops doc