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**SOP- Strategy Sessions with New Clients- Systems Vault**

**PREREQUISITES**

[Master: SOP- Strategy Sessions- Systems Vault](https://docs.google.com/document/d/1NRfraBF2DpZ-FGLz2vqGMNE5y6zfVduIP7Pd3Wc_lnc/edit?usp=sharing)

[Teamwork PM](http://sarahnoked.com/teamwork)

[Ontraport](http://sarahnoked.com/ontraport)

[SN Breakthrough Strategy Call Questionnaire](https://www.sarahnoked.com/questionnaire-breakthrough/)

[SN Template (Email): Strategy Session Purchase- Systems Vault](https://docs.google.com/document/d/1yXBuJOxrwySauDBxonVvUpOq_DbYURscrQZ6urZb7t4/edit?usp=sharing)

Client Questionnaires Response Folder

[SN Breakthrough Strategy Call Order Form](https://www.sarahnoked.com/breakthrough-session/)

[SN Master: Guidelines- Client Expectations- Systems Vault](https://docs.google.com/document/d/1DDp3y7Npb4mT3_F9fEdbdUS8eQ2HODgYk8HsTJD6u8E/)

[SN Template: Strategy Session Meeting Prompts- Systems Vault](https://docs.google.com/document/d/1YyTytRh-nUeRwph_0dX97vqUhDzVYjITU8qIov0vj-s/edit?usp=sharing)

[Neilpatel.com](https://neilpatel.com/)

[Facebook Ads Library](https://www.facebook.com/ads/library)  
[Facebook Pixel Helper](https://chrome.google.com/webstore/detail/facebook-pixel-helper/fdgfkebogiimcoedlicjlajpkdmockpc?hl=fr-fr)

Client Folders

**PURPOSE**

Strategy calls are offered as a one-off service (we call these “Breakthrough Sessions”) for new clients and new potential retainer clients (we call these “Getting Down To Business” Sessions). We do this to get a clear understanding of what the client needs at the onset of our OBM Services agreement and with potential OBM Services clients.

**POLICY**

As a general rule of thumb, all new clients purchase a Breakthrough Strategy Session as a “dating project” before starting ongoing retainer sessions.

Client purchases the strategy session here: [SN Breakthrough Strategy Call Order Form](https://www.sarahnoked.com/breakthrough-session/) and on the Thank Your Purchase page is redirected to the booking calendar to schedule the call. If the client does not schedule the call, they receive one more reminder email. If the call is still not scheduled, there is a task that is automatically sent from [Ontraport](http://sarahnoked.com/ontraport) to [Teamwork PM](http://sarahnoked.com/teamwork). Upon purchase clients receive this email [SN Template (Email): Strategy Session Purchase- Systems Vault](https://docs.google.com/document/d/1yXBuJOxrwySauDBxonVvUpOq_DbYURscrQZ6urZb7t4/edit?usp=sharing)

Prior to Strategy Sessions with new clients, the client is sent our onboarding questionnaire ([SN Breakthrough Strategy Call Questionnaire](https://www.sarahnoked.com/questionnaire-breakthrough/)) and it must be filled out 24 hours prior to the calls so that the materials can be reviewed. All Client Questionnaire answers are saved here: Client Questionnaires Response Folder.

Strategy Sessions with New Clients are generally 90 min long

**PARTY**

OBMs

**PARTY**

Agency Manager / Lead OBM

**PROCESS**

Part 1: Prepare for the Session

Part 2: Conduct the Session

Part 3: Session Follow up

**PROCEDURE**

**Part 1: Prepare for the Session**

1. Review Client Questionnaire: Client Questionnaires Response Folder
2. Do Due Diligence:
   1. Analyze Client Website on [Neilpatel.com](https://neilpatel.com/)
   2. See if the client is running ads [Facebook Ads Library](https://www.facebook.com/ads/library)
   3. Check website for broken links:
   4. Check website for FB Ads Pixel: [Facebook Pixel Helper](https://chrome.google.com/webstore/detail/facebook-pixel-helper/fdgfkebogiimcoedlicjlajpkdmockpc?hl=fr-fr)
3. Create an agenda for yourself to review with the client at the beginning of the meeting
4. Create a Client Folders

**Part 2: Conduct the Session**

1. Take detailed client notes and save in Client Folders
2. Follow the Sessions Prompts Doc: [SN Template: Strategy Session Meeting Prompts- Systems Vault](https://docs.google.com/document/d/1YyTytRh-nUeRwph_0dX97vqUhDzVYjITU8qIov0vj-s/edit?usp=sharing)
3. During the meeting, follow point 4 of [SN Master: Guidelines- Client Expectations- Systems Vault](https://docs.google.com/document/d/1DDp3y7Npb4mT3_F9fEdbdUS8eQ2HODgYk8HsTJD6u8E/)
4. Towards the end of the meeting decide if it makes sense to invite client

**Part 3: Session Follow up**

1. Put tasks in [Teamwork PM](http://sarahnoked.com/teamwork) for follow up
2. Create the Action Plan

**Created by:**

**Department:** Delivery

**Date:**

**Revised:**

**Revised by:**