**Onboarding Questionnaire**

**1. Can you provide a brief overview of your company, its mission, and any interesting facts about the origin story?**

He has a sales navigator profile. So good to get started there.

Around since 2001, Andy has been CEO for 5 years this coming March.

Acquired by a family business, one arm is a PE firm.

Previously focused company on block-chain, have since pivoted to Gen-AI to differentiate (Nova - lead in product) AI Agents to do QA. they are offering ability to create custom agents to do other tasks.

9 of 10 typically take the 2nd meeting, but deals are slow to close given they are trying to close fortune 500 firms.

Main channels to get these meetings are events - GDS (event organizer) 10-12 meetings with pre-qualified leads. But those numbers have dramatically decreased, because people are using the events to find new jobs.

2nd channel is typically their own personal network, or scheduling events themselves

Very small amount comes from inbound - event/content based marketing

Previously ran some paid ads on linkedin, but got no real outcomes from that either.

This is more of a product-based sales, not a service. How can we hook people with a demo of Nova. Let's try both approaches to see what works.

Healthcare is heavily adopting AI

**2. What types of companies can benefit from your offering? Can you describe their firmographic information (geographic location, company size, industry, startups vs mature biz etc.)?**

Wants to earn biz in the fortune 500-1000 not SMBs, they typically have vendors in place already. Sounds interested in global lead-gen not just US based - Australia/NZ. Do US first and then pivot elsewhere.

Can we figure out who is outsourcing QA to indian companies? That would likely be a highly qualified lead.

**3. Who are typically the decision makers within these target organizations (CEO, VP of Sales, Head of HR, Marketing Director, Founder etc)?**

CIO or CEO is most promising, some CTOs, then VP of app development, but they don’t want to start with QA. VP digital engineering, senior director, etc. VP of product is a good target as well.

**4. Who are your main competitors, and what differentiates you from them?**

Lots of players, mostly competing with outsourced development

**5. What major pain points or challenges does your product/service address?**

Quality issues, where other companies cut corners to offer the cheapest solution

CALL WAS CUT SHORT, THEY HAVE NOT RECEIVED AN APPROVAL FROM LEGAL YET. ONCE SIGNED AND PAID, THEY WANT TO SHOW US A DEMO OF NOVA TO GET STARTED

**6. Do you have any recognizable/notable clients we can reference in our copy?**

no

**7. Any major partnerships?**

no

**8. Are you backed by any notable investors or have you participated in any accelerator programs?**

no

**9. Do you have an existing database of leads or lists of prospects that we should incorporate into our efforts?**

Blue ocean for right now. Can incorporate some in the future.

Alfred Smith - works for the Pittsburgh Penguins in IT - they did not have their IP at the time when they connected, so he knows them as an innovation catalysts company. Driving asymmetrical returns for people to get things done with bots.

He moved from Boston to Pittsburgh about a year ago, but they met him 3 years ago.

ICP is CIO, CPO, vp of app dev, vp of testing

Find companies that use off-shore indian companies + outreach to australian + new zealand leads

**10. Are there any companies or prospects that we should blacklist and not engage with (for example, existing clients/customers)?**

Don’t want to reach out to GSIs, smaller ones. No overlap as a services company. SMB space is not ideal for them. In the US we want to avoid the government.

In New Zealand and Australia, the government is doable.

**11. Do you have existing messaging templates or content that you'd like us to use? If so, please share them here or during the onboarding session.**

Campaign for Nova, campaign for app-dev, possibly 3rd campaign. They’ll get back to us on how they want to run campaigns.

**12. What specific actions do you want the prospects to take in response to your messages (e.g., schedule a call, download a resource, join a webinar, sign up for a demo)?**

Take a demo right now.

**13. Are there any events you go to that we can keep in mind to schedule in person meetings for?**

CES first week of January, they have a spare room.

We can throw out the idea of giving people a ticket if they need one.

How can we target the CES attendees it’s in Las Vegas.

**14. What minimum results would you need to see from our campaigns in order to determine that this has been successful for you?**

Quality of meetings, pipeline, and their pricing is $250k/year. A closed deal would be amazing.

1st meeting to 2nd meeting 90%, half goes to proposal from there, it’s too early to tell right now because he has a lot of deals in procurement for about 50%. Deal cycles can be about 2-3 months with Nova.

Number of proposals that we’re able to get sent out.

**15. Can you please provide us with your calendly (or other scheduling tool) link that we can use to confirm your availability for interested leads?**

They did have one, if we get an interested person we can send it over to them. Let’s grab a time from the prospect and Andy or Jenna will make it work.

**16. In our standard performance review cadence, your Account Manager will meet with your team once per week for the first 4 weeks, and then biweekly thereafter. Would you prefer to make any adjustments to this schedule?**

**17. Is there anything we haven’t asked that you would like to share?**

Does he need to worry about having someone else on his LinkedIn?

They’ll connect us with Sam who can help us out.

[[INTERNAL NOTE]] DO NOT LEAVE THE CALL WITHOUT HAVING THEIR LINKEDIN PROFILE CONNECTED TO THE SYSTEM.

**Thank you! We’re looking forward to getting started.**

**Owner meeting on Friday morning - let’s schedule campaign review for 1pm PST - send out the invite for an hour.**