# Bonus Chapter 2

# Readiness Checklist

At Virtual Work Wife, we provide comprehensive "done-for-you" CRM setup services for Keap users. The checklists in this chapter illustrate the type of questions we ask to gather essential information before we start crafting customized solutions for our clients.

Taking the time to gather this information makes our job quicker and easier, ensuring that our clients are happy and able to quickly begin using Keap in their everyday lives.

When working with a "done-for-you" client there are a few things we need you to do before we can begin to create their Keap Ecosystem. We use a series of checklists and forms to collect the details that will help us get started and also provide guidance to help you complete the Done-For-You Intake Form so we can efficiently and quickly set up systems for our clients.

Below is a simplified version of our forms and checklists to help you move through your setup quickly. If there is anything we can do to help, please reach out and let us know! For example, if there is a certain piece of information that has you feeling stuck, you can join our Facebook group and use `#mentor` to let us know you're seeking help: `https://www.facebook.com/groups/bizacceleratorsuccesslab`

## Account basics

These basic settings will ensure that communication between you, Keap, and your contact list is streamlined and accurate.

- ☐ Have you set up your Keap user profile(s)?
- ☐ Have you connected your payment processing/merchant account?
- ☐ Do you know your Keap ID?
- ☐ What time zone do you want as your default? (This is used to determine what time emails or tasks will be generated.)
- ☐ What email address do you want to use for system notifications?
- ☐ What physical address do you want to use for billing notifications?
- ☐ Do you have links for the social media channels you use?

# Branding and logos

We will be personalizing Keap for you and updating the branding to match your specifications.

- ☐ Do you have your headshot?
- ☐ Do you have a company logo?
- ☐ Do you have program images/logos?
- ☐ Do you have a brand guide?

## Using your branding colors

Using consistent branding colors ensures accuracy and alignment with your company's vision, benefiting both you and any vendors you collaborate with in representing your brand.

- ☐ Color code for form borders:
- ☐ Color code for form buttons:
- ☐ Color for email hyperlinks:
- ☐ Color for email buttons:

## Products

- ☐ Create a list of all the products you intend to sell through your Keap app. Please include the following:
- ▪ Product name
- ▪ SKU (optional)
- ▪ Description
- ▪ Price
- ☐ We will also need 1 square image for each product. Square images are more visually appealing and fit the space better.

## Coaching programs

Before we can set up your programs, your coaching packages need to be clearly defined.

- ☐ How many one-on-one sessions will your program have?
- ☐ How many group sessions will your program have?
- ☐ Do you have a program agreement that needs to be signed?
- ☐ Will you require any questionnaires or intake forms?

# Appointment booking Set Up and Integration

A big part of your business is scheduling calls with your clients and potential clients. Using an online scheduling assistant is a great way to reduce manual labor and streamline scheduling because they can easily check the available slots without having to reach out to you directly.

> **Note**
> If your Scheduling Tool does not natively integrate with Keap, you will need to use a third-party tool (examples are given below).

- ☐ What Scheduling tool are/will you use?
- ☐ Keap
- ☐ ScheduleOnce
- ☐ Appointmentcore
- ☐ Calendly (requires Zapier)
- ☐ Acuity (requires Zapier)
- ☐ Other
- ☐ Do you have booking links for each session type?

## Third-party integrations

Third-party integrations are essential for expanding the functionality of your software platforms, enabling seamless data sharing and automation across various tools and systems, ultimately enhancing productivity and efficiency in your business operations.

- ☐ Will you be connecting to other tools via integrations?
- ☐ Yes
- ☐ No

## Marketing

Personalizing automated marketing is essential for building meaningful connections with customers and increasing engagement.

- ☐ Your name as you'd like it to appear on your *outgoing* emails.
- ☐ What country do you want your Keap account to refer to? (This is used for date format)
- ☐ The email address you want to use for contacting us replies.
- ☐ The email address you want to use for newsletters and broadcasts.

- ☐ The email address you want to use for product fulfillment.
- ☐ The physical address you want to use for your “can spam” line. To be compliant with marketing regulations, you need to provide a physical address for your “can spam” line. If possible, consider using a P.O. Box for this purpose.
- ☐ Phone number to use for *outgoing* email. This is a requirement for compliance with ”can spam” regulations.
- ☐ Company name
- ☐ Company website

## Social media

Social media is a great way for you to share your knowledge and gain exposure to potential clients, colleagues, and increase your brand awareness and authority.

To complete your Done-For-You setup, we need to know what social media platforms you are using and your links.

Which social media channels do you use?

- ☐ Facebook
- ☐ Instagram
- ☐ Twitter
- ☐ YouTube
- ☐ Pinterest
- ☐ Snapchat
- ☐ LinkedIn
- ☐ Twitch
- ☐ TikTok
- ☐ Discord

I hope this sample checklist is a useful guide to accelerate your CRM setup. Taking the time to provide forms and checklists to my “done-for-you” clients is my secret weapon to ensure everything runs smoothly and efficiently.

Remember, we’re here to support you every step of the way. If you hit a snag or need a bit of extra help, just hop into our Facebook group and use `#mentor` to raise your hand. We’re ready and eager to help you create a seamless Keap ecosystem for your thriving business. Let’s make this process as fabulous and stress-free as possible!