On-Boarding Module (Plug & Play)

GROW YOUR AGENCY

How to set up your On-Boarding process in 2 Hours:

The days of back and forth emails and meetings to on-board a client are over... This process will take around two hours but it'll be one of the most valuable things you'll ever do for your agency. You'll get closer to productising a service and your clients will absolutely love you for it.

You can reverse engineer my process here:

https://go.iag-media.com/90-day-paid-traffic-profit

1. Steal my funnel template here - http://bit.ly/2Lbrijb

2. Go through each funnel step and make sure that they are to your liking. Add business logos, removed emojis, truly make it suit your agency style. After that, make sure all the meta data is correct. Watch the video tutorial HERE

3. Make sure you link your business domain to clickfunnels. I already gave you instructions on how to do this in the website plug n play.

There are a few key things to remember when building out this process:

1. Make sure all links are correct and when they click on a link within the funnel, it opens up a new tab. Go through the funnel several times to double check.

2. Make sure you have a video explaining each step up along the funnel as I do. I'm dressed in a shirt and the background is clean in every video. Make this look professional. It doesn't matter if you don't have a fancy setup and need to use an iPhone. Just make sure you look presentable, it's quite & the background looks professional. You don't want your client getting buyer's remorse

3. Use Vimeo for the hosting as it's free like Youtube but more presentable. If you'd prefer not to, you can just use Youtube but make sure you create an agency Youtube rather than your personal one because they'll be able to find the video.

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Funnel Step 1

1. Create a short video on what your client can expect from the next 90 minutes or so. It's key to show them that this will actually SAVE them time & means that they can get results a LOT quicker because you can get straight into it. You can refer to my funnel if you need help.

Funnel Step 2

This step is really important because it's going to show them what you expect from them, what's acceptable behaviour, how they should move forward, etc.

1. Make sure you listen closely on the main module where I break down the psychology of the on-boarding process.

2. Now that you understand the psychology, it's time for you to create your own video. Within the content portal for this module, there will be a keynote slide template that you can use. Fill out the blanks and make this presentation your own. Once it's ready, it's time to record.

3. **Recording:** In terms of recording software, use Loom Pro and then once it's recorded you can download as part of the Pro features.

4. **Edit + Upload:** Make sure you export it and upload it to Vimeo or Youtube. As I said, Vimeo is definitely preferable.

Funnel Step 3

You need to make sure that before you send your client this on-boarding process, you send them the invoice. Preferably they should've paid on the call once they say yes. This is the only aspect of the on-boarding which can't be automated.

For contracts, I use the same template & their e-signature is their proof that they agree. I've never had a client ask for an amendment but it could potentially happen. Just remember - **ALWAYS** get paid before the client gets the deliverables. For example, before you turn their ads on, before you start consulting or before you start creating content for them. Contracts are pointless, I just do it for the client to be honest.

1. Send off the invoice using Simple Invoices. As I said, you should be sending invoice and taking payment directly after the client says yes 90% of the time.

2. Draft up a contract, if you need a template Click HERE

   Open it then press ---> File ---> Add To My Drive. You can now edit this contract template and make it your own.

   You can also go to the resources section of the course to see 3 more detailed versions of a contract you can use. These aren't as evergreen though and need to be manually tweeked.

3. The key with this contract is to make it Evergreen, here's a video explaining what I mean: Click HERE

4. For any service with fluctuating variables such as consulting outside of a structured workshop setting or content creation, you'll have to create a unique contract and send it with the invoice prior to sending off this on-boarding funnel. Paid traffic, social media growth/awareness, structured consulting gigs, etc. all fall under the evergreen category.

5. Sign up to the Pro Version of HelloSign. After that, create a template link, this will allow you to use an evergreen contract and have clients all sign the same one without you ever having to change it.

   Here's a video on how to set it up: Click HERE

6. Go back to ClickFunnels and make sure you link it to the 'Click Here' page & make sure it opens in a new tab

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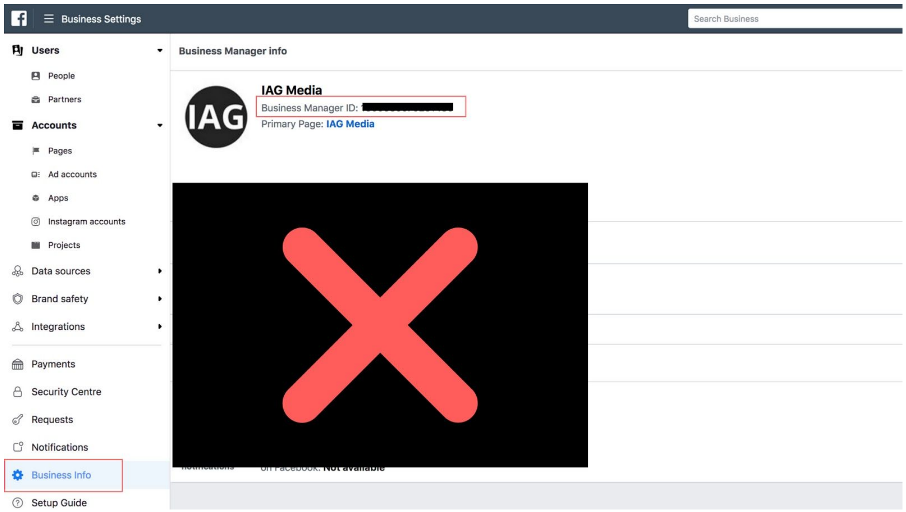
Funnel Step 4

Here is where you get access to their ads manager/business manager. If it's a paid traffic client, make sure they give you access to their Ad account, their business pages, their pixel (if applicable) & their instagram (if applicable)

1. Make a short video explaining how they can integrate your Facebook business with their accounts. You can use my video as an example: https://go.iag-media.com/ads-manager

2. Here is where your Business ID is located:



3. Follow the protocol to screen capture, upload on Vimeo & then throw it up on the ClickFunnels page.

4. Make sure you don't forget to copy paste your Facebook Business ID onto the ClickFunnels page so the client can use it.

Funnel Step 5

This step really helps you frontload a lot of the work, it allows you to shorten the length of your strategy session by making the client fork over most of their info ahead of time.

1. You can either use [Google Forms]() or [TypeForm]() - I recommend Google for 99% of you because it's free, I just like the branding on Typeform but it sets me back around $400 a year... haha stay lean! Go for Google.

2. Check out my questions here: https://imangadzhi.typeform.com/to/gZVM0t
You can either copy it entirely or you can make some tweaks depending on what you're selling to the client

3. Grab the link for the survey and put it into the ClickFunnels page tagged under 'Click Here'.

Funnel Step 6:

Now it's time for them to setup their strategy session with you. You need to pieces of software here, a scheduling software and Zoom.

I always use Zoom to call because it keeps things evergreen. With Zoom, you can have one meeting link and hand that out to everyone without having to grab their details.

1. Purchase the Acuity Scheduling 'Emerging' plan

2. Make sure you sign up to Zoom - Get the free plan

3. Make sure Acuity is linked to your calendar software so it doesn't show inaccurate availability to your clients, and so that Acuity will set the event in your Calendar.

4. I made a video walkthrough that'll show you how to setup the meeting appointment type, how to integrate your Zoom ID & how to embed the schedular into the ClickFunnels - Click HERE

Funnel Step 7:

In this final step, just let them know you're excited to see them on the call and that you'll get their Slack channel (Whatever means of communication you want) setup on the call.