2 Onboarding

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👾 Useful links

- Where can I see the *Superfunnel* **deals won**? HUBSPOT
- Where can I see the *Superfunnel* **leaders**? HUBSPOT
- Where can I see the *Superfunnel* ***onboarding projects***? HUBSPOT
- Where can I see the *Superfunnel* ***OPEN onboarding projects***? HUBSPOT
- Where to upload leader's **PDFs**? HUBSPOT
- Where to **update Leader IDs**? HUBSPOT
- Where can I see the *Superfunnel* ***activation*** **tickets**? JIRA
- Where can I see the *Superfunnel* **process playbook?** CONFLUENCE
- Where can I see the overall *Superfunnel* tracking report? HUBSPOT
- Where can I see the list of *Superfunnel* **leaders enriched by Clay?** SPREADSHEET
- Where can I see the *Superfunnel* **service information?** SPREADSHEET
- Where can I see a summary of *Superfunnel* **leaders on deck?** SPREADSHEET

🧩 Leader Journey Stages

Lifecycle Stage	Onboarding Stage	Key Outcome	Timeframe
Recent Closed Won	Pre-Onboarding Preparation	Leader Owner + Project Owner assigned	Close Date + 3 days
Executive Onboarding	Executive Onboarding	Kickoff completed, deck delivered	Close Date + 7 days
Technical Onboarding	PRAYStudio Profile & Marketing Setup	PRAYStudio Profile, Fund ID,	Close Date + 14 days

		Campaign ID, Marketing Assets	
	Product Activation		Close Date + 14-21 days
Adoption & Engagement	Superfunnel First Week Live	Campaign live, billing started	Close Date + 21–28 days
	Closed - Onboarding Complete	Health score tracking & retention rhythm established	Ongoing

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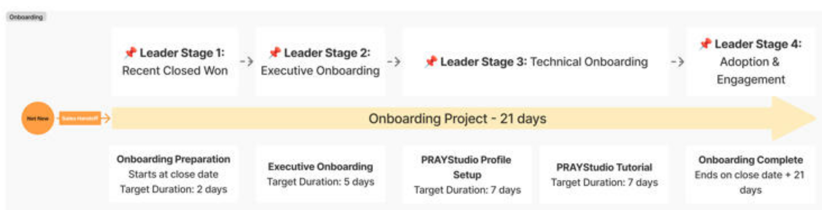
✅ Onboarding Checklist

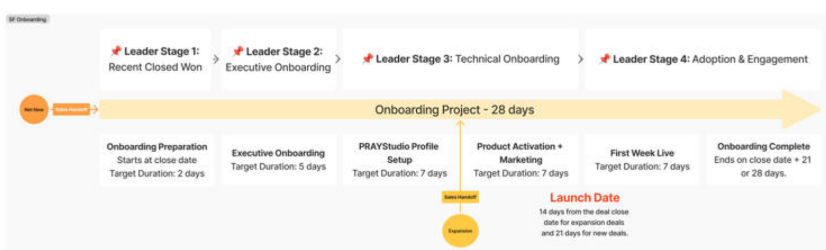
Pipelines involved:

- **Leader Pipeline:** Ministry SaaS (Customer Success)
- **Deal Pipeline:** Retention (Existing Business)
- **Project** Pipeline**:**

IF it's not superfunnel - **Project** Pipeline: Leader Onboarding



IF it's **superfunnel** - **Project** Pipeline: Superfunnel Onboarding



🤝 Net New & Win Back Sales Handoff

📅 **Start Date:** New Business Deal Close Date

End Date: New Business Deal Close Date

📥**Input:**

When a Net New deal is Closed Won (New Business)

🤖 **Automated Action items:**

1. Sets the **Deal** History Label on the enrolled deal to 'First Closed-Won.'
2. Sets **Deal** Classification on the enrolled deal to New Business.
3. Creates a **deal** record
   - Deal Name: "Leader Name - Consolidated ARR"
   - Pipeline: Retention
   - Deal pipeline and stage: Onboarding & Implementation (Retention)
   - Deal Classification: Account Monitoring
   - Deal Type: Consolidated
   - Leader Website: Copy from the deal property Leader Website of the Enrolled deal.
   - Agency Website Domain (Example: pray.com): Copy from the deal property Agency Website Domain (Example: pray.com)
   - Auto-Renewal: Copy from the deal property Auto-Renewal
   - Billing Contact Email: Copy from the deal property Billing Contact Email
   - Child Company Website Domain (Example: pray.com): Copy from the deal property Associated Child Company Name
   - Leader Type: Copy from the deal property Leader Type
   - Effective Date: Copy from the deal property Effective Date
   - Key Manager Email: Copy from the deal property Key Manager Email
   - Leader Name: Copy from the deal property Leader Name
   - Payment Method: Copy from the deal property Payment Method
   - Payment Terms: Copy from the deal property Payment Terms
   - Company Segment: Copy from the deal property Company Segment
   - Associate the consolidated deal with: The deal enrolled, Associated contacts, All associated companies, Associated leads, Associated quotes, Associated calls, Associated meetings, Associated emails

*If it's an **expansion** deal, the information will be edited instead of created.*

4. Sends **an external email** to all associated contacts: Welcome to PRAY.COM, new leader from
5. Differentiate the won deal and branch between Syperfunnel, PRAY Radio & TV, or others.
6. Creates a **Leader** record
   - Leader Name (App Display Name): Copy from the deal property Leader Name
   - Leader pipeline: Ministry SaaS
   - Leader pipeline stage: Recent Closed Won (Ministry SaaS)
   - Closed Won Reason: Copy from the deal property Closed Won Reason (dropdown)
   - Short Term Goal: Copy from the deal property Short Term Goal
   - Long Term Goal: Copy from the deal property Long Term Goal
   - Associate the leader with: The deal enrolled and label it as First Closed-Won, Associated contacts, All associated companies, Associated leads, Associated quotes, Associated calls, Associated meetings, Associated emails

*If it's an **expansion** deal, the leader will have his information edited instead of created.*

7. Creates an Onboarding **Project** record
   - Project Name: *"Leader Name"* - *"Product Name"* - Onboarding

- **Pipeline:** SuperFunnel Onboarding & Launch
- **Pipeline Stage:** Pre-Onboarding Preparation (SuperFunnel Onboarding & Launch)
- **Priority:** High
- **Type:** Service
- **Status:** On track
- **Start date:** Copy from the deal property Close Date
- **Target Launch Date:** 21 days from the deal close date
- **Target due date:** 28 days from the deal close date
- Associate the project with: the deal enrolled, Associated contacts, all associated companies, Associated meetings, Associated emails, and Associated Leaders.

8. Sends a **Slack** notification to Nate, Aaron, Andi, Nay, and Jason, to the Ministry Channel, and the deal owner
9. Sends an **internal email to** Andrea Laurent, Nay Luchetti, Aaron Magnuson, Jason Rosoff, Marco Santiago, Nate Roemer, and the Deal owner

📤 **Output:**

Consolidated deal, Leader, and Onboarding Project record created.

📚 **Resources:**

- Automation: [01) Sales handoff - new client]
- Automation: [01.1) Sales handoff - Renewal & Expansion]

🧼 **Sales handoff SOAP**

The Deal record has the **properties:**

- [ ] Deal Name
- [ ] Create Date
- [ ] Deal Owner
- [ ] Deal Type: *New Business or Win-back*
- [ ] Pipeline: *New Business*
- [ ] Deal Stage: *Closed-Won*
- [ ] Leader Name
- [ ] Leader webiste
- [ ] Leader Type
- [ ] Closed Won Reason (dropdown)
- [ ] First Value Goal (Manual) - Optional
- [ ] Long Term Goal (Manual) - Optional

The following **Mandatory Associations** are active:

- [ ] A company labeled as a parent that has Segment, Domain, and Type populated. *(Reminder: Associate all companies related to the negotiation. If the deal involves other companies, it needs to be associated and labeled as a Child or Agency.)*
- [ ] Contact that has email and job title populated. - The contacts that must receive the communications must be related to the deal.
- [ ] A Product that includes Product Category, Term, and Billing Frequency, Service Start Date, and End Date per line item
- [ ] A Quote that includes a signature, that provides for Product SKU (Line Item) with Quantity, Term, Billing Start Date, Service Start Date, and Service End Date
- [ ] *If it's an **expansion** deal, all the above, the leader must be related to the deal*

📚 **Resources:**

- [Association: Deal ∞ Child Company]

- Association: Deal ∞ Agency
- Association: Deal ∞ Key Manager Contact
- Association: Deal ∞ Billing Contact
- Association: Deal ∞ Leader
- Association: Deal ∞ Company
- Association: Deal ∞ Leader 2
- Association: Leader ∞ Contacts 2
- Quotes approval flow
- Deal → Company Segment & Leader Type

🔹 Leader Stage 1 — Recent Closed Won

📅 **Start Date:** New Business Deal Close Date

End Date: New Business Deal Close Date + 2 days

📥**Input:**

When a Net New deal is Closed Won (New Business)

🤖 **Automated Action items:**

1. **Create task:** Onboarding prep and CSM assignment → *"Leader Name":* Review the signed contract and deal information in HubSpot, assign a leader owner, assign an onboarding project owner, check the leader type, and segment.
2. **Create task:** Internal Kickoff. → *"Leader Name":* *Pre-Kickoff meeting with Sales Deal Owner*

📤 **Output:**

- Leader Owner filled
- Project Owner filled

📚 **Resources:**

- Automation: 02) New Leader Onboarding - Recent Close-won + Executive Onboarding

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🔹 Stage 2 — Executive Onboarding

📅 **Start Date:** New Business Deal Close Date

End Date: New Business Deal Close Date + 7 days

📥**Input:**

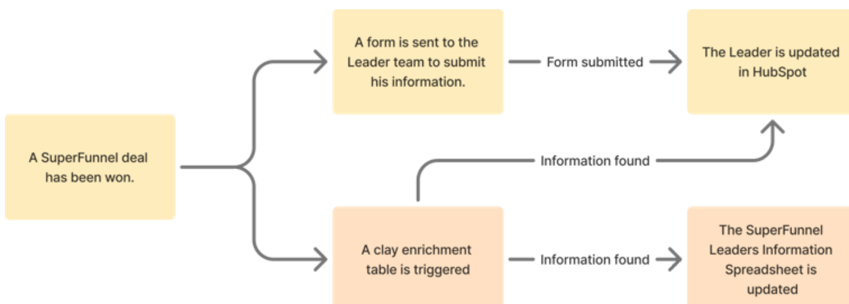
When a New Leader Onboarding or a SuperFunnel Onboarding & Launch Project is created, and the Stage is any of the Pre-Onboarding Preparation stages.

🤖 **Automated Action items:**

1. **Create task:** Schedule Executive Onboarding Meeting + Build Onboarding Deck → *"Leader Name":* Schedule the kickoff meeting within seven business days of the agreed-upon start date, then create the Executive Onboarding Deck. You can use the "Pre-Call Email Template" for it.

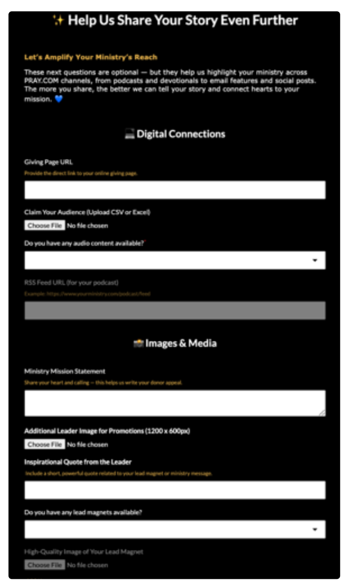
2. **Create task:** <u>Executive Onboarding Meeting → *"Leader Name":*</u> At this stage, the Account Customer Success Manager (CSM) conducts the first alignment meeting with the client to collect and share information and expectations.
    - Gather information on team structure and decision-makers.
    - Identify key stakeholders and their roles.
    - Ensure submission of the New Leader Form.
    - Confirm payment status and billing setup.
    - Review the client's use case, expected outcomes, and product package.
    - Send an email to key contacts sharing the leader lifecycle, frequently asked questions (FAQ), and expectations.
3. **Create task:** <u>Executive Onboarding Follow-up email → *"Leader Name":*</u> Send an email to key contacts sharing the leader lifecycle, frequently asked questions (FAQ), and expectations. You can use the [Executive Onboarding Follow-Up]() or [SuperFunnel Executive Onboarding Follow-Up]() template for it.
4. **Create task:** <u>Ensure the leader's assets are collected → *"Leader Name":*</u> Ensure submission of the New Leader Form to gather the leader's assets to build his profile on PRAY.COM.

> ⚠️ The **artist assets collection** is crucial for SuperFunnel activation. These assets can be collected (1) from the form submission or (2) through Clay's automated enrichment.



Form submission:

HubSpot Form



HubSpot Form

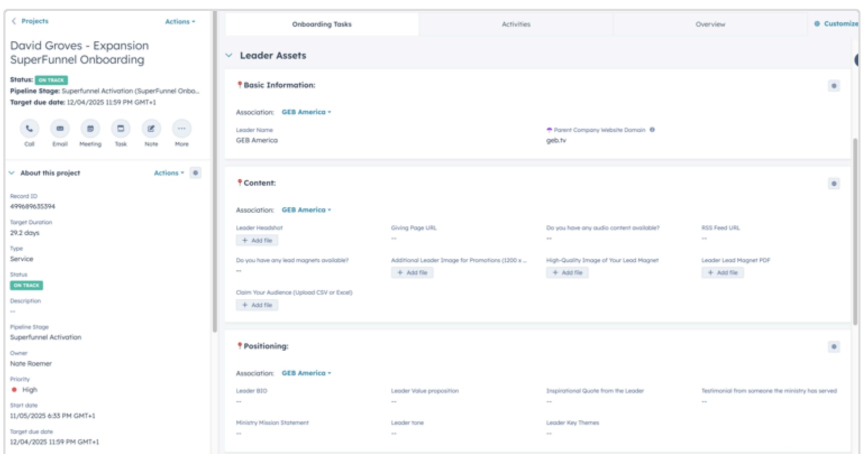
Clay Enrichment:

```
Clay enrichment entity type rules
———If person → use LinkedIn
——————————————if company → use domain
```

Item	Notes	Source
Leader Name	The name of the leader as it should appear on the PRAY APP.	🔑
Leader Website	The official website of the organization associated with the name displayed on the PRAY APP. If the artist type is a Person, this website might be separate from the parent company's site responsible for the purchase.	🔑
Artist Type	Classify these artists as either (1) a person or (2) a company	🤖
Leader Instagram	The official Instagram of the brand associated with the name displayed on the PRAY APP.	🤖
Leader YouTube	The official YouTube of the brand associated with the name displayed on the PRAY APP.	🤖
Leader LinkedIn	The official LinkedIn of the brand associated with the name displayed on the PRAY APP.	🤖
RSS Feed URL	Link to where an RSS feed can be accessed	🤖
Leader Podcast URL	Link to where the audio content can be accessed	🤖
Podcast Host Name	Primary host of the podcast/show name	🤖
Leader Audience CSV	Claim Your Audience (Upload CSV or Excel)	📄
Donations Page URL	Ministry Giving/Donations Page URL	🤖
Leader Lead Magnet	Lead Magnet PDF or URL	🤖
Leader Lead Magnet Image	Lead Magnet Promotional Image File or URL	🤖
Leader Logo	Leader Logo File or URL	🤖

Leader Headshot	Leader Headshot File or URL (3000x3000)	🤖
Leader Promotional Image	Leader Image for promotions File or URL (1220px 600px)	🤖
Leader Bio	Description of Ministry	🤖
Leader Value proposition	A list of ways the ministry serves the world with donations.	🤖
Leader quote	Inspirational quote from the leader related to giving/donating	🤖
Leader Social Proof	Testimonial from someone the ministry has served	🤖
Leader Mission	Ministry Mission Statement	🤖
Leader Tone	The tone of voice used by the leader in his external communications	🤖

✅ Once it is collected, this information will be available (1) on the Leader Assets section on HubSpot Leaders, (2) on the Leader Assets section on the Onboarding Project, and (3) on the [Superfunnel leader assets enriched]



📤 **Output:**

- Executive Onboarding Meeting complete
- Executive Onboarding Follow-up email sent
- Leader Assets properties filled

⚠️ When a task named “**New Leader Form**” or “Leader Assets” is completed, an automation updates the pipeline stage to “**PRAYStudio Profile Setup”.**

📚 **Resources:**

- Automation: 02) New Leader Onboarding - Recent Close-won + Executive Onboarding
- WIP - [Template] Executive Onboarding Deck
- [Active] Leader/Ministry Onboarding Form (complete)

- [Executive Onboarding Call Checklist and Email Templates]
- [Superfunnel leader assets enriched].

Opportunities:
Revise the checklist in the HubSpot Playbook.

🔹 Stage 3 — Technical Onboarding

📅 **Start Date:** New Business Deal Close Date

End Date: New Business Deal Close Date + 21 days

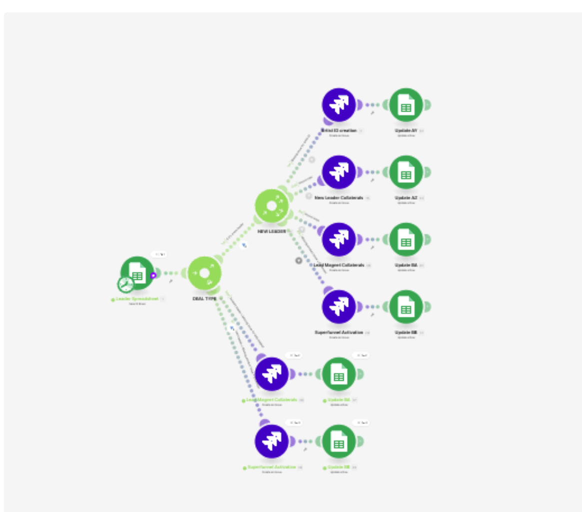
📥**Input:**

New Leader Onboarding Project has moved to stage "PRAYStudio Profile Setup."

🤖 **Automated Action items:**

1. **Create task:** Artist ID created → *"Leader Name":* Clay has made a Jira issue requesting Andy Meyer to generate the PRAYStudio artist ID for the Leader. Check if this task has already happened.
2. **Create task:** PRAYStudio Profile Personalization → *"Leader Name":* Upload all assets necessary to complete the Leader Profile. (photos, content, description). Ensure that product access is provisioned.
3. **Create task:** Subscription+ & Ministry Match Setup → *"Leader Name":* Subscription+ Setup (Stripe) and Ministry Match Integration (Direct sync or CSV import)
4. **Create task:** Schedule technical training session + Build Deck → *"Leader Name":* Build the tutorial deck using new assets and schedule a technical call within seven business days following the Executive Onboarding Call.
5. **Create task:** Conduct Technical training session → *"Leader Name":* Conduct the training session with the Leader, Connect Social tool, and select Key Languages for translations.
6. **Create task:** Send Technical Onboarding Follow-up email → *"Leader Name":* Unique Dropbox upload link for Content Delivery - Pray TV (MP4, <4 GB preferred, naming convention) + Google Drive link for Content Delivery - Pray Radio (MP3, naming convention).

Jira tickets created via Make:



Issue Title	Trigger	Description	Owner	Due Date
Create New Artist ID	New Leader is enriched in Clay	Create an artist ID on PRAYStudio for New Leader	Andy Meyer	+ 7 days
New Leader Collaterals	New Leader is enriched in Clay	Build new Leader Collaterals • Profile Image (Vertical) • Leader Profile Image (Square) • Profile Image (Horizontal) Profile Image (Circle) Banner cover image (1080 x 1080) • Fund Image (1080x720) • Default Cover Art PRAY Radio Cover Art PRAY TV Cover Art	Jose	+ 14 days

- @Nate Roemer and @Aaron Magnuson, to make this work, update the **Artist ID, Fund ID, and MM ID** in HubSpot, not on Slack. I've updated the retroactive data. Moving forward, use this official LS Handoff link for product and marketing: https://app.hubspot.com/contacts/2592247/objects/2-41621067/views/56018855/list

📚 **Resources:**

- Automation: 03) New Leader Onboarding - Technical Onboarding
- Technical Onboarding Call Checklist and email templates
- Link where the issues are created
- SuperFunnel Activation Tickets (Jira)

📤 **Output:**

- The leader profile on PRAYStudio is personalized
- Artist ID published
- Fund ID published

🔷 Stage 3.1 — Technical Onboarding: PRAY Radio or TV

📥**Input:**

New Leader Onboarding Project has moved to stage "PRAYStudio Profile Setup," and the product suite of the associated leader contains PRAY Radio or PRAY TV

🤖 **Automated Action items:**

1. **Create task:** *Create links for PRAY Radio and PRAY TV → "Leader Name":* Create links for PRAY Radio and PRAY TV. Connect Social tools and Key Languages selected for translations.

🔷 Stage 3.1 — Technical Onboarding: SuperFunnel

📥**Input:**

New Leader Onboarding Project has moved to the "PRAYStudio Profile Setup" stage, and the leader's product suite now includes SuperFunnel. The Project advanced to the "Superfunnel Activation" stage after the first closed-won deal included a Superfunnel line item.

🤖 **Automated Action items:**

- **Create task:** Lead Magnet Assets → *"Leader Name":* Clay created a Jira issue asking Jason to create a lead magnet if the leader lacks one, and Jose to create promotional assets for it. Review this task upon completion.
- **Create task:** Fund ID Handoff → *"Leader Name":* Create user attributes and campaign IDs needed for Lead magnet tracking, Triggered emails in marketing automation systems (Braze, Amplitude). Provide ID to Marketing for campaign targeting.
- **Create task:** Campaign ID Handoff → *"Leader Name":* Handoff campaign ID so Ryan can set the Supperfunnel ads. Ryan and the marketing team need to manage the ad creative and targeting strategy. This should include both leader-specific ads and generic PRAY.COM ads. The creative messaging must align with the client's mission and their call to action.
- **Create task:** Supperfunnel Email & campaign setup → *"Leader Name":* Once it is collected, the necessary information will be available (1) on the Leader Assets section on HubSpot Leaders, (2) on the Leader Assets section on the Onboarding Project, and (3) on the Superfunnel leader assets enriched. The Marketing Team needs to create an email sequence for a triggered lead magnet. Design the Subs Plus email, including relevant images and copy. Ensure that all campaigns are linked to the correct Fund ID. Provide the necessary parameters to Ragu to facilitate the building of the report.
- **Create task:** Supperfunnel Launch Execution → *"Leader Name":* Once all systems and assets are ready, Marketing launches ad campaigns. The product ensures funnel tracking is active and attribution is accurate. Sales and success teams monitor progress closely via Slack and Jira.

Jira tickets created via Clay:

Issue Title	Trigger	Description	Owner	Due Date
Create Leader Lead Magnet	New Leader is enriched in Clay and has no lead magnet	Build a Lead Magnet for this leader. Information on the ticket.	Jason	+ 14 days
Leader Lead	New Leader is enriched in Clay	Build lead magnet promotional collaterals.	Jose	+ 14 days

Magnet Collaterals		• Lead magnet promotional hero image: 1082 x 1400 • Lead magnet promotional header image: 1920 x 1080 and 1280 x 720 • Lead magnet mockup image: 2400 x 1600		
Superfunnel Ad and report coordination	New Leader is enriched in Clay and has the Artist ID and Fund ID	Ad and reporting coordination when the studio profile is ready	Ryan	+ 16 days
Superfunnel Activation	New Leader is enriched in Clay and has the Artist ID and MM Campaign ID	Once the PRAYStudio setup is complete, the Product team activates the client's Superfunnel instance. • Leader Name • Artist ID • MM Campaign ID • Specific targeting (if required) • Contract Amount	Sean	+ 18 days

⚠️ When a task named "**Launch Execution**" is completed, an automation updates the pipeline stage to "**Launch Execution & Billing Start"**. Also, it copies the task completion date to the associated leader's "**Superfunnel Launch Date."**

📤 **Output:**

- Training session with the Leader is complete
- Technical Onboarding Follow-up email sent
- Supperfunel Ads are live
- The billing process has begun

📚 **Resources:**

- Automation: 03.1) Expansion SuperFunnel Onboarding
- Technical Onboarding Call Checklist and email templates
- Let's Build Your SuperFunnel external email sent to all associated contacts (for expansion)
- [Active] Superfunnel Onboarding Form

🔹 Stage 5 — Adoption & Engagement

📅 **Start Date:** New Business Deal Close Date

End Date: New Business Deal Close Date + 21 days

📥**Input:**

7 days after “Superfunnel Launch Date”.

🤖 **Automated Action items:**

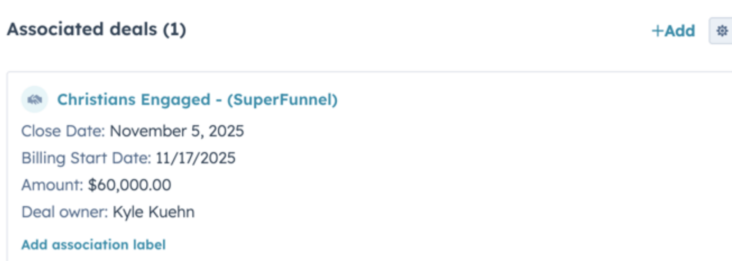
- **Create task:** Post-Launch Follow-Up → *“Leader Name”:*
  a. Monitor performance daily during the first week.
  b. Address any issues immediately in the dedicated Slack channel.
  c. Provide regular reports to the client based on the agreed-upon metrics.
  d. After lunch, monitor for one more week, then move the onboarding project to Ready for retention.

📚 **Resources:**

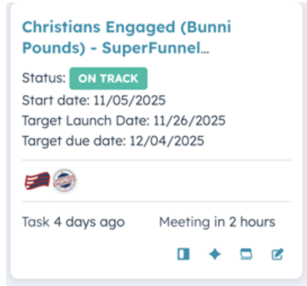
- Automation: 03.1) Expansion SuperFunnel Onboarding
- Technical Onboarding Call Checklist and email templates
- Let’s Build Your SuperFunnel external email sent to all associated contacts (for expansion)
- [Active] Superfunnel Onboarding Form

📌 Important Dates to Track

- Deal → **Close Date**: manually set by the AE when he moved the deal to Close-won (New Business)
- Deal → **Service Start Date**: manually set by the AE when he fills the quote
- Deal → **Billing Start Date**: manually set by the AE when he fills the quote



- Superfunnel Onboarding Project → **Start Date**: set by automation when a new project is created, copying from the deal close date.
- Superfunnel Onboarding Project → **Superfunnel Target Due Date**: set by automation when a new project is created, adding 14 days from the deal close date for expansion deals and 21 days for new deals.
- Superfunnel Onboarding Project → T**arget Due Date**: set by automation when a new project is created, adding 21 days from the deal close date for expansion deals and 28 days for new deals.



- Leader → **Supperfunnel Launch Date**: manually changed by the LS team when the launch happens. Can be changed on the onboarding project or directly by the leader.