Start a general list of the items that seem to cause delays or confuse your new customers:

1) Your initial Welcome message & video.

2) A checklist for customers.

3) A checklist of all information you need to start the project

 4) Setup your Admin (Bookkeeping, Contract, Servers, etc)

5) Setup your Project Management tool.

 6) Plan for the kick off call.

7) Announce it to your team and describe the goals and scope.

8) Have your kicko call   
 a.) Confirm scope and timeline

 b.) Discuss delays

c.) Discuss content and what is needed

d.) Discuss proper images

 e.) Discuss the technology (domain, hosting, any 3rd party issues)   
9) Send a Meeting Recap and list any issues or opportunities that came up in the Kick O Call. 10) Plan for the next follow-up meeting.

11) Send your next series of follow-up emails over the course of 1-2 weeks. What are the roadblocks within your business?

Onboarding Tips   
1) Avoid sending all emails at once or every day. Try to space them out every 2-3 days so as not to overwhelm.   
2) For all emails, make sure it’s personalized.

3) Keep the emails short and to the point. Do not overload them with too many tasks or topic   
in one email.

4) Go back to the beginning.. with the Onboarding Process... any changes or improvements   
based on customer feedback.

The content in this webinar has been written by WP Elevation Community Mentor Christina Hawkins. This document is for your use, but is not to be copied or plagerized in any way. For more information about Christina and her business, head to Ghtltopbsa:/l/Sgploebxalspex.com/   
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