

CLIENT ONBOARDING PLAN & SCRIPT

FIRST STEPS

- Receive Order form from Sales Representative.
 - *This may come in the form of a [BPO](#) from client*
- Ensure the client has an account in Reputation Management and in a PAY state - if not, convert to pay; if there is no Reputation Management account, let the sales rep know and ask them to create the account (or create it on their behalf).
- Complete the account activation and optimization then [add the account to Task Manager](#) [Full checklist for new client setup is [here](#)].
 - Verify address with [USPS](#) (usps.com → 'check zip code'). What is entered on their account should match this.
- Add Account notes (what has been ordered, contact person, sales person etc.).
- Create any custom tasks in Task Manager required for the client.
- Send the SMB a “before the onboarding call” email. Edit it to what they have ordered. CC their sales rep and all other contacts.

Example Email

Hi [business owner's name],

Thank you for choosing to work with [Partner Name]! We're excited to get things started, beginning with our onboarding call on [! scheduled date]. Before our call, there are a few things that I would like you to start thinking about in order to complete our call quickly and efficiently.

<If Listing Distribution>

During this call, I will confirm your business listing information, and discuss how it will be updated with our data providers. This is the best way to ensure that listing sites retrieve the correct information.

<If Visibility Premium>

Visibility Premium involves us working with you to verify (also known as 'to claim') your primary listings. This allows us to correct the information right away. In order to verify your Google Plus, Bing, YP, and Yelp listings, I will need you to grant me access to a business gmail account, and I will need you to be near your business phone during our call. Please have your gmail address and password ready for the call, and I will walk you through the verification process of these listing sites.

<If Review Management>

To prepare to discuss review management, I will need you to be logged into Facebook during the call, if you have a business Facebook page. Don't worry, I won't be asking for your Facebook login. I will walk you through the Admin process. If you have claimed your Yelp and Google Plus listings, I will also need you to have your login credentials ready. If you have any other review site logins that would be useful to me, please have those logins on hand.

If you have not claimed Yelp or Google Plus, I will need you to provide me access to a gmail address that we can use to claim these sites. I recommend that this be a business gmail address and not a personal account.

In order to respond to Yelp reviews, Yelp requires each account to have a profile photo. This is the photo of who is responding to the business reviews. Please have this ready for our call, and please note that a logo will not be accepted by the site.

<If Social>

To prepare to discuss social posting, please be logged into Facebook, and have your Twitter and Google Plus logins on hand if those pages exist for your business. Also, start to think about the type of content that you wish for us to post about! We'll discuss this further during the call.

Once our onboarding call is complete, your account will be up and running! I look forward to working with you and your business.

Have a great day!

[Digital Agent's Name]

CALL PREP

- It is always good to know who they purchased the solution from.
- Go over the solution with the client and ensure the correct expectations are set.
 - Visibility (Listing Distribution, claiming, etc)
 - Visibility Premium - claim the big 4
 - Review Management
 - Positive - new offering - no approval
 - Negative - 24 hour approval
 - Mentions

- Claim Google Plus and Yelp
- Social Posting (2 or 4 per week)
 - Requires access to Facebook, Twitter, Google Plus
- Reporting
 - Monthly Task Manager Report - shows the work that has been done, in progress, and waiting for client
- Review any of the discrepancies that came up in the Reputation Management account (i.e. NAP data unclear or not matching USPS)
- Finish up with a summary of what you have talked about and answer any questions.
- If call is unsuccessful, try calling one more time the next day, and if unreachable, push back to sales rep. Or attempt to complete the onboarding over email.
- If call was successful, send follow-up email and cc rep to show that the call is complete.

Example Email

Hi [contact name],

Thank you for taking the time to complete our onboarding call today! Our team will now be monitoring your account and are here to answer any questions that you might have.

As I mentioned, you will be receiving a monthly task report which shows all of the tasks completed, or in progress for the month. Please keep in mind that listing correction is a long-term process, so you will notice that your listings will be "In Progress" month after month, until the listing site retrieves your information from the data providers. Every listing site has respective processes on updating and verifying information, so patience is key. All of the work is being done in the background, but this is a 'Do It With Me' solution, so I will contact you if I require your assistance with anything in your account.

If you have any questions in regards to billing or additional services, please contact your sales representative. If you have any questions regarding your listings and Digital Agency services, please contact our team.

Thanks again for taking the time to chat with me today, and thanks for choosing to work with the Digital Agency!

Have a great day,

[Agent Name]

- Edit any task notes that are needed.
- Complete the onboarding task in Task Manager when call is complete.
- If call is unsuccessful, include when call was made and set reminder to call again next day.

IMPORTANT - Ensure that all communication is logged in the onboarding task notes so it is tracked.

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[Listing Distribution](#)
[Visibility Premium](#)
[Review Management](#)
[Mentions](#)
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Introduction

This is [NAME] calling with [PARTNER NAME]. May I please speak with [CLIENT NAME]? This is in regards to the Brand Management that he/she purchased through [SALES REP NAME].

<get correct contact on the line>

What this call is going to focus on is to ensure that everyone's expectations are aligned as to what this 'do-it-with-me' solution involves. I will be confirming your business information, going over the services that you ordered, and answering any questions that you might have for me.

Listing Distribution

Before I submit your business listing to our Listing Distribution system, I first want to verify that we are updating the data providers with the correct information.

<verify business name, address, phone number, website>

<if there is a consistent difference in the NAP within the listings (name is typically one version), let them know, and confirm the business name>

<Verify hours of operation and update the hours in Presence Builder Business Profile>

Now that we have verified this information, your business listing will be submitted to our four data providers. These are entities that aggregate business information in compliance with their set guidelines, and make available for individual online directories to retrieve when they update their listing information. It is then up to each individual online listing to retrieve this information, and update it on their respective sites. There is no guarantee of information changing, or in a specified amount of time, but you will be receiving a monthly report that will tell you if updates have been made during that month or not.

If, at any point, you change your business name, phone number, website, or address, it's important that you let me know. I will send you a follow up email with my contact information.

Visibility Premium

To speed up the process of correcting your online listings, I would now like to take a few minutes to work with you to claim your primary listings. This will allow us to correct your business information right away on Google+, Bing, Yelp and YP - ensuring that the information is fully up to date on these sites. In order to claim your listings, I will need access to a gmail account that is associated with your business. This can be an existing account or you can take a minute to create a new account. This will purely be used for claiming your listings.

Most of these listing sites verify the business information through an automated phone call requesting for a PIN, or by sending a postcard with a PIN to the business address. Once I receive the PIN, we are then able to update the information and get you full access to that listing site.

<get email and password. log in, you may need to get a backup phone number or email address to verify the account.> [<Creating a Gmail instructions - at the end of the doc>](#)

[<Claiming instructions- at the end of the doc.>](#)

When our agents login to your Gmail account, you may receive an automated email from Google. These emails are just to inform you that someone has logged in from somewhere other than your location and require no action on your part.

I also want to make you aware that you will likely be receiving calls from reps of listing sites offering paid advertising and listing services such as Yelp and YellowPages. These programs are completely separate from the package you have purchased from us, and it is up to you if you wish to go through with these offers.

Review Management

In regards to Review Management, this service is split into two sections: Mentions and Reviews.

Mentions

On a weekly basis, our team reviews all of the mentions of your business that come from articles, blog posts, Twitter, and any review sites that are not covered by our review response service. If we find a negative mention that has recently been posted online, we will send you an email with a link to that site. This service is simply to make you aware of what is being said online, and does not include responding or removing these negative comments.

Reviews

Review responses involves our team responding to both your positive and negative reviews. When our system finds a positive review, we will respond on behalf of your business with a personalized, tailored response. These are posted as we receive them.

When our system finds a negative review, we will email you the review along with our suggested response. We will provide you with 24 hours to make any edits or suggestions to the response, and send us those changes via email. If we do not hear from you after 24 hours, we will post the response on your behalf. Our responses are never canned, and always are tailored to the review content.

Typically our responses will be apologetic, frame the business in a positive note and invite the reviewer to take the conversation offline. This avoids any further comments on a public review site. When taking conversations offline, we direct them to a contact at

the business. Would that be yourself, or would you like for me to direct it to someone else at the business?

<Enter the contact name, phone number and/or email into account notes (example: Review contact: Name - Phone number- Email address)>

If you receive a star rating review, we do not respond on your behalf. We will only be responding to the reviews that include written content.

<if they ask why we do not respond to star rating>

The reason we don't respond to these reviews, is to reduce the likelihood of sounding like an auto-response, or filling up review pages with responses. When there is written content to reference to, it's much easier to address their comments and stay authentic when interacting with these customers.

In order to respond to these reviews, I will need access to your review pages. Initially, we will get access to your Facebook, Google Plus, and Yelp listings.

To access Facebook, I will need you to add me as a page admin. please log into your personal Facebook account and go to your business page. Click Settings in the top admin panel, and click Page Roles. add [name and email] as Admin. It will ask you to enter your personal account password.

<if you already have a gmail, you don't need this part>

For Google Plus and Yelp, I will need access to a gmail account that is associated with your business. This can be an existing account or you can take a minute to create a new account. This account will purely be used to claim your listings.

Again, when our agents login to your Google+ account, you may receive an automated email from Google. These emails are just to inform you that someone has logged in from somewhere other than your location and require no action on your part.

I also want to make you aware that you will likely be receiving calls from reps of listing sites offering paid advertising and listing services such as Yelp and YellowPages. These programs are completely separate from the package you have purchased from us, and it is up to you if you wish to go through with these offers.

<get email and password. log in, you may need to get a backup phone number or email address to verify the account>

[<Creating a Gmail instructions - at the end of the doc>](#)

[<Claiming instructions- at the end of the doc.>](#)

Social Posting

In addition to what we just spoke about, we will also be creating and posting (2 or 4) social posts per week to your social pages.

<if you don't already have access>

Before we discuss the content that we will posting on your behalf, I first need to get access to your social pages.

To access Facebook, I will need you to add me as a page admin. please log into your personal Facebook account and go to your business page. Click Settings in the top admin panel, and click Page Roles. add [name and email] as Admin. It will ask you to enter your personal account password.

If you currently have a Twitter account, I will need your username and login. *<try the credentials, you may be asked a security question>* If you do not have Twitter and choose to create one, please send me the credentials at that time.

<depending if Google Plus is claimed, and if they have access>

<If the client inquires about social posting to LinkedIn, please mention that they either have to login to their business center and connect the profile themselves or share their personal LinkedIn credentials with us that the page is linked to.>

<Claiming instructions- at the end of the doc.>

Now that we have access to everything, we can discuss the content that we will be posting.

When creating social posts, we like to keep a balance of marketing posts, such as specials or products and services you offer, with interesting content found online. Examples of this would be trending articles, holiday-related posts, and blog posts related to your industry.

I have a list of questions that I'll go through to get a better idea of the type of content that you're looking for.

Example Social Questions

- Business Details: First off, tell me a little about your business. What do you offer, what sets you apart, etc?
- Target Audience/Vision: Who are you hoping to target with your social profiles? New customers, existing customers? What about a target demographic/age range?
- Content: We like to include a balance of information about your business with interesting facts within the industry, and trending articles related to your industry and your customers. Do you have any topics that would be useful in starting a dialogue with your clients about? What are you hoping to inform your followers about? We also encourage you to send us any new information as we go. This allows us to keep our content up to date.
- Websites: Are there any websites that you tend to use to find industry information or that you think we would find useful in gathering content from?
- Things to Avoid: Are there any topics, websites, or information that you do not want us to use?
- Company Slogan: Do you have a company slogan or catch phrase that we could incorporate into your social posts?
- Events and Organizations: Is your business involved with sponsoring and/or participating in any events or organizations?
- Humor: How do you feel about including some family-friendly humor? Memes, pictures, or articles.
- Deliverables: Do you have a calendar of events you could provide us with? Do you have promotional material and/or photos that you would like us to use? (please send in email after)

We always stay away from competitors, as well as content related to politics and religion.

I encourage you to send us feedback on the content as we go, and at any time if you have new ideas, or you have a special sale or event that you would like us to focus on, please send me an email. I also want to remind you that you are more than welcome to continue posting to your page, but we are here to provide that extra content to keep your page active and relevant.

We generate posts about a week in advance, so if you have anything coming up, any events or specials, please have them to us the week before they begin.

You will see your first two posts appear on your pages within the next couple of days. We do not keep to a strict schedule when posting, but keep it spread out throughout the week.

Social Calendar

With the Social Media Calendar, we will be sending you one month's worth of posts at a time, for your approval (8 for 2/week 16 for 4/week). You can generally expect these posts shortly after our monthly content call. We ask that you confirm the supplied posts with us as soon as possible, so we can have them all scheduled for the following month.

Monthly Calls

I will be contacting you each month to arrange a call to discuss any events and specific content you and your business have coming up in the next month.

We will not be drafting and sending any posts until we receive this monthly content from you, so we appreciate your cooperation with these calls.

Approval

After we send you the month's worth of posts, we ask you to confirm them with us, or provide any updates or changes you would like to see. We provide for the full replacement of up to four posts per month, if necessary.

Please note that in the event of late approvals, no posts will be scheduled until approval has been given, and could result in a reduced number of posts scheduled.

Posts

When creating social posts, we like to keep a balance of marketing posts, such as specials or products and services you offer, with interesting content found online. Examples of this would be trending articles, holiday-related posts, and blog posts related to your industry.

Any questions about how the Social Media Calendar works?

The second part of the Social portion of this call will center around your business and the type of content you'd like to see on your social profiles. **** Go through Social Questions above ****

Are there any specific events coming up for <insert month>?

Reports

The last portion of our services that I need to cover is reporting. You will be receiving daily alerts from the dashboard, but those are simply to keep you informed of what our system is finding out about your business. No action needs to be taken on your part, unless our team contacts you, but definitely read what is being sent in these alerts, as it is all insight into your online presence. We will be sending you a monthly report that will show all tasks that are in progress, anything that we are waiting for you on, and any tasks that have been completed. These are always sent out in the first week of the month.

I know we've covered a lot today, but do you have any questions for me? I am always available via phone or email if you think of something at a later time. Before I let you go, I just want to verify the email address that I have on file for you <verify email>

If that's everything, I will let you get back to your day. I'll send you a follow-up email with my contact information so you can reach me at any time. Thank you and have a great day!

Creating a Gmail

- Fill out the [Gmail account creation form](#).

Claiming

Check out the Big 4 Playbook [here](#).

Claiming Google Plus

- **If Google Plus is not claimed:**
 - In order to claim your Google Plus page, I will need you to answer an automated call from Google. Are you able to put me on hold when they call? If you are ready, I will have them call you now. Please listen for a pin number and write it down. Once they have called, I'll need you to repeat that code back to me.
- **If Google Plus is already claimed:**
 - I see that your Google Plus has already been claimed. Do you have access to this listing?
 - **If yes to access:**
 - If you would like, I can transfer ownership to your gmail so your listings are all under one login.
 - or
 - Could you provide me with the login credentials for this account?
 - if no to creds,
 - You can add me as a manager on this page. Simply go to the page's dashboard, click the gear box, click Settings, click Managers, and add davebstanley@gmail.com
 - **If no to access:**
 - I will need to contact Google in order to break this claim. This will take several days, but I will contact you when we are able to work together to reclaim this listing. If you receive an email from Google, please do not respond to it, simply forward it to me.
- **If Google Plus page does not exist:**
 - It does not appear that there is a Google Plus page for your business. I will create one now, and see what options are available to us for claiming. (create page, either send postcard, or use phone verification).

Claiming Yelp

- **If Yelp is not claimed:**
 - Before we claim Yelp, I need to create an account. Please give me just one moment. The claiming process for Yelp is similar to Google Plus, but this time, I will give you a pin number that you need to enter into the phone when they call. If you are ready, I will have them call you. Please put me on hold, and wait for the call.
- **If Yelp is already claimed:**
 - I see that your Yelp listing has been claimed. Do you have access to the biz.yelp.com account?
 - **If yes to access:**

- If you would like, I can transfer ownership to your gmail so your listings are all under one login.
- **If no to access:**
 - I will need to contact Yelp to break the claim on this listing. If I require your help with this, I will follow up. If you receive an email from Yelp, please do not respond to it, simply forward the email to me.
- **If Yelp listing does not exist:**
 - It does not appear that there is a Yelp listing for your business. I will need to create the listing and we will have to wait for it to be published by Yelp before we're able to claim. I will follow up with you when the page is ready to be claimed.

Claiming YP.com

- **If YP is not claimed:**
 - Before we claim YP, I need to create an account. Please give me just one moment. The claiming process for YP.com is exactly like Yelp. I will provide you with a pin number that you will need to enter into the phone when they call. If you are ready, I will have them call you. Again, please put me on hold and come back on the line when you're finished.
- **If YP is already claimed:**
 - I see that your YP.com listing has been claimed. Do you have an account in adsolutions.yp.com?
 - **If yes to access:**
 - If you would like, I can transfer ownership to your gmail so your listings are all under one login.
 - **If no to access:**
 - I will need to contact YP to break the claim on this listing. If I require your help with this, I will follow up.
- **If YP.com listing does not exist:**
 - It does not appear that there is a YP listing for your business. I will need to create the listing and we will have to wait for it to be published by YP before we're able to claim. I will follow up with you when the page is ready to be claimed.

Claiming Bing

- **Bing is always available to claim:**
 - Before we claim Bing, I need to create an account. Please give me just one moment. (Bing will either give a phone option or a postcard)
 - If phone:
 - You will receive an automated phone call from Bing. Please write down the pin number, and repeat it back to me when you are finished with their call.
 - If postcard:
 - Bing is going to send you a postcard that will include a pin number. When you receive this, please send me an email or give me a call, and we will complete the verification process.