# ✅ DIFM/DIWM New Client Checklist

Great! You've signed a new DIFM client! Here are some guidelines to help you get started! It is important to illustrate in your contracts with your clients what kind of fulfillment work you are completing: how many social posts, if you are doing claiming work, are you responding to reviews (positive or negative), etc. This will help define what work you will be setting up for the client.

❏ **Assign the salesperson**

You'll want to keep a salesperson assigned as they will be notified of customer activity if they are added to a campaign (i.e. opened email, clicked Call to Action, etc) or if they express interest in any new products via the Business Center. The salesperson will also see their accounts in the Sales Tool so they are able to monitor and add sales records to monitor revenue. For the salesperson to get notified of these activities, it is important to assign your accounts.
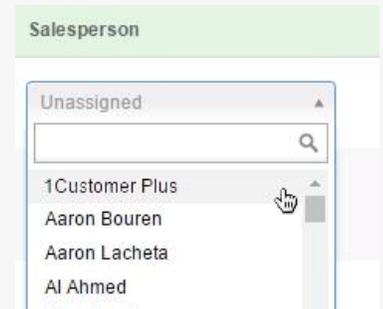
❏ **Convert the Demo account to paid (if applicable) or Create the Paid account**

If the client was added as a prospect using the Sales Tool you'll need to convert the account to paid. Full instructions here. NOTE: If the account was *not* created as a Demo, you will need to create their account via Partner Central using these instructions.

❏ **Activate the products that you require**

Since the Sales Tool only creates accounts for Reputation Management and Presence Builder, you will need to turn on any other products the client purchased. This is all completed in Partner Central >> Accounts >> Click the account name to make these changes (e.g. FAQ to activate Listing Distribution is here). You will see all your Product Catalog items there as well.

❏ **Optimize Reputation Management account**

- **Listings & Reviews -** Ensure the business data (name, address, phone number and website) was entered into the account correctly. Reviews will only be pulled in if we find their relevant listing on the Listings tab.

  - Mark 'Not Mine' to anything that is not their listing (the name and info can be wrong, but if it's a different name and different address, mark 'not mine' so we do not monitor that listing).

  - Click 'stop ignoring errors' on any listings that have been marked 'ignore errors'. We do this because we stop pulling in updates when marked as ignore.

- If the NAP data seems off (most listings are consistently something else), make a note to ask about it during the onboarding call
- If you know they have existing listings for certain sites, verify they have been found. Follow these steps to manually add listings if missing.
- Review their listing sites in settings to ensure all the appropriate sites are showing

- **Review Generation -** if you are offering Review Generation to your clients, you can access their settings by click the gear icon under Reviews. For example, you can edit the 3 suggested review sites for sharing.

- **Mentions -** Add some Mention searches for your client by clicking the gear icon to begin adding relevant search keywords to monitor when the business is mentioned online. It is suggested to include the business name, common name, any managers or owners' names, and twitter searches (@businessname, #businessname).

- **Social -** Set Up Social Accounts - Authenticate your client's social accounts. You'll need to obtain their logins during onboarding.

- **Competition - Edit Services and Competitors -** Double check that the service categories (Key Words) and competitor names that were added during account creation are accurate.
    - You can also add the competitors' social accounts for Facebook, Twitter, and Foursquare so you client can start seeing their Social Audience comparison.

- **Reports -** Click Edit Report Settings to set up the notification settings, email recipients, and frequency of executive reports.

    - Some partners adjust the Reputation Management settings so that the client no longer receives the Executive reports moving forward (since they will instead receive the Concierge Monthly report).
    - Add client to receive daily alerts - some partners also add the sales rep.

| Overview | Listings | Reviews | Mentions | Social | Competition | **Reports** |

Reports ⓘ

close report settings ▲

Send to:

Preferred Email Address *

Additional Email Addresses

Send me:

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❏ **Optimize the Presence Builder account and Location Page**

- **Location Page -** Choose the theme, add branding (logo, color, pictures) and edit the slug if you wish. Once you have the basics, begin to add pages (videos, custom, contact, images, coupons). You can add as many or as few as you require. Check out this training video to walk you through how to edit the Location Page.

- **Profile Sync -** Connect their social profiles in order to instantly sync their business data with the social profile.

❏ **Optimize the Social Marketing account**

- Authenticate the Social Accounts

- **Lead Searches -** These are meant for you to help find leads that your client can reach out to with special offers or deals.

- **Interesting Content -** Here you can access our RSS Feeds to find content for social posting.

❏ **Concierge**

Next you'll want to activate the client in Concierge.

- Add the account to Concierge

  - If this is your first client you'll want to review your Global Settings.
    - You can then further adjust the individual account settings to reflect what the client ordered.
    - In Account Settings > Listing Sources, turn off any listings that you will not be editing or claiming
  - Other Concierge FAQs are also available.
  - Set the correct agent as the default assignee
  - **Note**: If using Vendasta's Digital Agency, we will complete this step for you.

❏ **Create User (Optional)**

If you also want to give your client access to their account via Business Center then you'll need to ensure they have a login. If the client was created using the Sales Tool, they likely have a login already. If they are a brand new account you'll need to create a new User. Both searching for and creating new users can be found in Partner Central under the Users tab.

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❑ **Provide client with available resources (Optional)**

Our resource center has some great unbranded material and videos that can be shared with your client to help them learn the products. This may not be relevant if you are not giving them access to their products.

❑ **Onboard the client**

- [Digital Agency best practices](#) - We suggest providing a [Business Profile Questionnaire](#) (BPQ) to the client.

- An example Client Onboarding Script is also available [here](#).

❑ **Start claiming the "Big Four"   (Google, Bing, Yelp, and Yellowpages)**

Playbook for this can be found [here](#).

❑ **When using our Digital Agency (Enterprise Partners)**

By now, you should have had an onboarding call with our Digital Agency to review the new client process. If you have not, please get in touch with your Account Executive to arrange.

Before we get started on working on your clients' accounts, we require a access to a branded email from you so that we can remain white labelled when communicating with your clients.

- To submit orders to the Digital Agency, all you have to do is:

    - Create an active Reputation Management account or convert the existing demo Reputation Management account to PAY

    - Submit the Digital Agency Order Form (the link to this form is included in your Digital Agency introduction email)

- FAQs for the Digital Agency are [here](#).

- Here's the [link](#) to our Digital Agency Guide.