Onboarding Document

Date: Nov. 1st, 2019
Contact: First last name
Customer: Company name

Smarteams.io

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Welcome to Smarteams.io

Hi xxxxx,

We are so happy that you have made the choice to come onboard with the Smarteams.io, our team is dedicated to help you super charge your lead pipeline so you can to generate revenue faster and more efficiently. Pay for what you want, **results** and not all the headaches!

Our mission is to talk the pain out of operating your sales and marketing team and help you dramatically increase your quailed leads, sales and revenue. So no longer are you forced to individually hire expensive sales & marketing employees and incur HR & tech expenses. While trying to balance your Business operations and product/services development.

We wanted to start this relationship with a strong, while creating a trustworthy and transparent environment. Following this email, you will be sent a separate email with the onboarding document, please have a review, as we will be using this as a guide to get you all setup.

Your designated Account manager will be reaching out to you in the next 48hrs to see if you have any questions and then will book an onboarding call to go over the information in the document so that we can better understand your business, your customers and what is needed to provide you with the qualified leads you need to increases your revenues. Plus, after the call we will be able to setup your custom customer dashboard that will contain all status and analytics, so you know in real time where your leads are at.

Welcome again to the Smarteam.io and looking forward to building a great long-lasting relationship.

Sincerely,

Brian Prokopowich
Founder Smarteams.io

Client to do list: What we need from you Sales & Marketing

Marketing:
We will be needing account and web access so that we can start to automate the marketing process and create MQL's. We will need access to the following.

- **Company Email:** e.g. Sales@yourcompany.com and name, email, phone number of whom We will set as admin on our dashboard and for us to send qualified leads or deals.
- **Website:** We will provide you a sniped of code to add to your website this will track leads. If you cannot add the code, we will get our tech to add it you your website. Let us know what pages you want us to forward leads too. (We will provide you with code to embed via after our discovery call)
- **Branding:** Please provide us your Branding guides, Content Logos, Colour keys, marketing blurbs, images you wanted us to use. (Provide us with google drive or drop box will content)
- **Social Media Account:** We will need access to your social media accounts, username & passwords. So that we can managed and add new content them on your behalf.

  - Facebook: Username:
    Password:
  - LinkedIn: Username:
    Password:
  - Instagram: Username:
    Password:
  - Twitter: Username:
    Password:

If you currently use a service you want us that, please provide us with access to add content, integrate with our system so we can monitor the analytics of each posts.

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How do we handle Qualified Leads & Sales

Below we will indicate the two main service packages we offer that relates to how qualified leads & sales/closing deals are handled.

Professional package: Lead generation with qualified lead hand off to client!

When we have a qualified lead, who gets the Lead information and what is the process for us to follow for lead hand off. Since we track leads, and success when you close the deal please provide us the information if the deal is closed so we can update your pipeline or not and if the deal is lost why So we can update your KPI's.

Enterprise package: Marketing & Lead generation, qualification & closing the deal

Once we have a qualified lead and are ready for the next stage either product demo, or product discovery call we will invite you into the conversation to help answer any questions when they come up depending on how you want us to close deals as this is tailored to your needs. This would be handled as a 3-way call, conference call, Skype, zoom meeting with the client (We may use other platforms, so we invite more contacts, share screens, record calls and more).

(Optional in person meeting with our reps if needed and depending on the level of service you need). When it comes to a more transactional sale, we will provide the client with a quote based on your specs. Or we can work with your team so that you would provide us with all presentations and final Quote that we would send off to the client on your behalf. Please let us know in this document, what the process will be?

What is your product or service?

-What is the pain you are solving:

-Please provide us a detailed description of the product or service you are offering?

-What the cost that are involved?

-Do you have training material, Case Studies?

-What makes your product desirable/ what's your value proposition?

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Competitor analysis:

- Who are your competitors, what are their strengths and weaknesses?
- How does your competitors' product compare to your product/services?
- When it comes to objections, what are the common reasons prospects do not buy and buy!
- Other info.

Audit current marketing & Sales practices

For this we want to review your past campaigns & sales strategies. So that we can get a better understanding of what worked and what did not. We may have to come back to this and ask more detail questions as they come up!

Marketing:

- What are you currently doing, to market your product/service?
- What is your monthly spend on Social media ads (Facebook, Instagram, LinkedIn, Google, etc..)
- What marketing technology do you use!

Creating Buyer Persona Profiles:

It is important for us to start of the onboarding process to create a buyer persona so that it will help us target the leads to the exact target marketing you need so we can quickly convert leads. Do not get stuck on this section this is to give a basic overview of the type of people we should target, now over the months we define the persona in more detail.
Note: This post is a great resource, https://blog.hubspot.com/marketing/buyer-persona-questions to create the buyer persona

Buyer personas:

1)

2)

3) ____

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4) ____

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What success mean to you, what are your key KPI’s, Setting targets:

Marketing: What KPI’s (key performance Indicators) do you track? Our default metrics are as follows:

- -Total contact
- -Total campaigns running with name?
- -New contact added
- -Snapshot of activities (Campaigns, deals, Total Contact, Forms, Lists)
- -Bounced contacts
- -Unsubscribe Contacts
- -Active campaigns with click percentages

<u>Sales:</u>
We will be needing account and web access so that we can start to automate the leads sales process to create SQL’s. We will need access to the following:

• What are the KPI’s (key performance Indicators) are you do you use? Our default metrics are as follows:
-Deals Chart (Month to date) with New deals, pervious period & Goals
Closed deals performance (Won & $ Amount)
Sales performance (Month to Date)
Sales leader board: (Deals & $ Amount)
Sales Pipeline Chart (Month to Date)
Close Chart Lost Vs Wins (Month to date)

What are your sales target you need us to hit leads per month and email out each per week,
In sales and marketing?

What does a qualified lead mean to you?

Demo Smarteam.io dashboard

This will be done during our onboarding call

Final Step:

Setting up launch call and point of contact at Smarteams.io & weekly Stand-up meetings

Weekly stand-up meeting set for: Mondays at 9am EST via Zoom

With Account manager, (First meeting will be with project managers in Sales & marketing lead by your account manager)
Follow up meeting will be with Account managers.

Launch date: Nov 3, 2019

Management assigning staff (Private for Starteams.io to fill out) *only thing public is project managers.*

Marketing Team:
Designated Marketing Project manager: Patrick I
Copy writer:
Content writers:
Social media posters:

Sales Team:
Designated Sales Project manager: Brian Prokopowich
Sales outreach:
Lead qualifying:
Sales Pro/closing: