



Your Company Onboarding Interview

Onboarding Checklist:

Before we Start

1. Do we have the agreement signed?
2. Do we have payment processed?

Moving Forward

3. I'm going to ask a few specifics about the business
4. Then we'll dig into your team structure
5. Then we'll dig into your technical details
6. Then we begin to dig into your vision (I collect your existing vision ideas)
7. We take the discussion and map out a plan for your business marketing deadlines
8. We work to clarify and optimize any pieces of the buildout
9. Then we build.

Company General Information

Friendly Name:	Click or tap here to enter text.
Legal Business Name: <i>(used for compliance)</i>	Click or tap here to enter text.
Business Main Email <i>(easy and first place you check email for the business):</i>	Click or tap here to enter text.

Business Phone:	Click or tap here to enter text.
Business Website:	www. Click or tap here to enter text.
Note: Click or tap here to enter text.	

Business Niche: (Check the most applicable)

☐	Financial Services	☐	Online Training & Education	☐	Legal Services
☐	Marketing and Advert.	☐	Real Estate	☐	Retail & Ecommerce
☐	Fitness & Lifestyle	☐	Home Services	☐	Other: Click or tap here to enter text.
☐	Health and Medical	☐	Restaurants		

Business Type:	Choose an item.										
Business Industry:	Choose an item.										
Business Registration ID type: <i>(Check the most applicable)</i> <table border="1" style="margin-top: 10px;"> <tr> <td>☐</td> <td>USA - Employer Identification # (EIN)</td> <td>☐</td> <td>Other Non USA</td> </tr> <tr> <td>☐</td> <td>USA - DUNS # (Dun & Bradstreet)</td> <td rowspan="2">☐</td> <td rowspan="2"> Explain: Click or tap here to enter text. </td> </tr> <tr> <td>☐</td> <td>None - Sole Proprietor</td> </tr> </table>		☐	USA - Employer Identification # (EIN)	☐	Other Non USA	☐	USA - DUNS # (Dun & Bradstreet)	☐	Explain: Click or tap here to enter text.	☐	None - Sole Proprietor
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☐	USA - DUNS # (Dun & Bradstreet)	☐	Explain: Click or tap here to enter text.								
☐	None - Sole Proprietor										
Business Registration <i>(if business)</i> EIN #	Click or tap here to enter text.										
Business Regions of Operations (Check the most applicable)	Choose an item.										

Business Physical Address:	Click or tap here to enter text.
Time Zone preference:	Click or tap here to enter text.
Note: Click or tap here to enter text.	

Business Information (for phone compliance)

Authorized Representative Name:	Click or tap here to enter text.
Representative Email:	Click or tap here to enter text.
Job Position/Role:	Click or tap here to enter text.
Representatives Phone Number:	Click or tap here to enter text.
Note: Click or tap here to enter text.	

The Team

Leadership and Management

Who are key decision makers, or opinions involved in branding, marketing, website. (Internal only non-contractors)

Name:	Click or tap here to enter text.	Role:	Click or tap here to enter text.
Mobile:	Click or tap here to enter text.	Email:	Click or tap here to enter text.
Notes:	Click or tap here to enter text.		

Name:	Click or tap here to enter text.	Role:	Click or tap here to enter text.
Mobile:	Click or tap here to enter text.	Email:	Click or tap here to enter text.
Notes:	Click or tap here to enter text.		

Name:	Click or tap here to enter text.	Role:	Click or tap here to enter text.
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Mobile:	Click or tap here to enter text.	Email:	Click or tap here to enter text.
Notes:	Click or tap here to enter text.		

Other Internal Team Members (who would need access to System, would help with following up with calls, leads, would email or text potential customers)

Name:	Click or tap here to enter text.	Role:	Click or tap here to enter text.
Mobile:	Click or tap here to enter text.	Email:	Click or tap here to enter text.
Notes:	Click or tap here to enter text.		

Name:	Click or tap here to enter text.	Role:	Click or tap here to enter text.
Mobile:	Click or tap here to enter text.	Email:	Click or tap here to enter text.
Notes:	Click or tap here to enter text.		

Name:	Click or tap here to enter text.	Role:	Click or tap here to enter text.
Mobile:	Click or tap here to enter text.	Email:	Click or tap here to enter text.
Notes:	Click or tap here to enter text.		

Note: Click or tap here to enter text.
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Other External Team Members (who would be assisting in lead follow up, website or marketing.)

Name:	Click or tap here to enter text.	Role:	Click or tap here to enter text.
Mobile:	Click or tap here to enter text.	Email:	Click or tap here to enter text.
Notes:	Click or tap here to enter text.		

Name:	Click or tap here to enter text.	Role:	Click or tap here to enter text.
Mobile:	Click or tap here to enter text.	Email:	Click or tap here to enter text.
Notes:	Click or tap here to enter text.		

Name:	Click or tap here to enter text.	Role:	Click or tap here to enter text.
Mobile:	Click or tap here to enter text.	Email:	Click or tap here to enter text.
Notes:	Click or tap here to enter text.		

The Tech (Phone Set Up)

Current Phone Number(s) on Advertising/Websites:	Click or tap here to enter text.
Phone Services:	
☐ Cell Phone #	☐ Land Line Business Service (At&t, Verizon, etc)
☐ Google Voice	☐ Other: Click or tap here to enter text.
☐ Ring Central, 8x8, Grasshopper, other VOIP	☐ Notes: Click or tap here to enter text.
Current Set Up:	Click or tap here to enter text.

Do you know if your current phone service allows forwarding?:	Click or tap here to enter text.
Do you have texting with your current services?:	Click or tap here to enter text.
Do you want the value of hearing team calls?	Click or tap here to enter text.
Is it worth an extra few cents per minute?	Click or tap here to enter text.
Note: Click or tap here to enter text.	

Website

Who oversees and/or Manages your website customization, builds and tweaks?

Name:	Click or tap here to enter text.	Role:	Click or tap here to enter text.
Mobile:	Click or tap here to enter text.	Email:	Click or tap here to enter text.
Notes:	Click or tap here to enter text.		

Name:	Click or tap here to enter text.	Role:	Click or tap here to enter text.
Mobile:	Click or tap here to enter text.	Email:	Click or tap here to enter text.
Notes:	Click or tap here to enter text.		

Name:	Click or tap here to enter text.	Role:	Click or tap here to enter text.
Mobile:	Click or tap here to enter text.	Email:	Click or tap here to enter text.
Notes:	Click or tap here to enter text.		

Note: Click or tap here to enter text.
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Emails Used

What email do you use for your main communication with customers? Click or tap here to enter text.	
Main email	Current: Click or tap here to enter text.
	Preferred: Click or tap here to enter text.
Customer support email	Current: Click or tap here to enter text.
	Preferred: Click or tap here to enter text.
Sales email	Current: Click or tap here to enter text.
	Preferred: Click or tap here to enter text.
Outgoing Email (<i>broadcasts or campaign</i>)	Current: Click or tap here to enter text.
	Preferred: Click or tap here to enter text.
Notes (<i>who has logins, changes desired</i>) Click or tap here to enter text.	

KEY LOGIN DATA

What Domain (URL's) do you Own?

Domains	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Domain Registrar	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
User Name	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Password	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
3 rd Party Auth (Y/N) & Where	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Emails included (Yes or No)	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Where are Emails Managed	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Notes:			

Do you have Hosting?

Hosting Company	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Domain Hosted	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
User Name	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Password	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
3 rd Party Auth (Y/N) & Where	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Notes:			

Where are your Email Addresses Hosted?

Emails	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Email Management	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
User Name for Set Up/Registrar	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Password	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Would You like Your emails pointed at a gmail or other email box?			
Notes:			

Do you have any locations where you have accumulated lists?

Platform	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Username	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Password	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Size of List (Import Y/N)	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
3 rd Party Auth (Y/N) & Where	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Notes:			

Are there any other platforms we need access to (Phone, Web, Platforms, Cloudflare etc)?

Platform	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Username	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Password	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Use:	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
3 rd Party Auth (Y/N) & Where	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Notes:			

Video Conferencing

Do you use Video Conferencing for speaking with Clients? *(if no skip to next section)*
Click or tap here to enter text.

What services do you use? (ie Zoom) Click or tap here to enter text.
Changes Desired around Video Conferencing: Click or tap here to enter text.
Note: Click or tap here to enter text.

Scheduling

Do you use Schedulers for speaking with Clients? Click or tap here to enter text.
What services do you use? (ie Calendly, Setmore, etc) Click or tap here to enter text.
How do you use the calendaring in your business, who controls it? Click or tap here to enter text.
Changes Desired around Scheduling: Click or tap here to enter text.
Note: Click or tap here to enter text.

Google My Business

Who handled the set up of your Google My Business: Click or tap here to enter text.
What Email do you use to manage your GMB Account: Click or tap here to enter text.
Do you have the password easily available? <i>(At our next meeting I'll need you to have that password.)</i> Click or tap here to enter text.
<u>Notes:</u> Click or tap here to enter text.

Messaging

MISSED CALL TEXT BACK

What would you like the response to be when someone calls and we text them back?	
☐	Option 1: Hi this is {{ custom_values.response_rep_first_name }}, I saw that we just missed your call how can I help? Can I get your first and last name? - {{ custom_values.company_friendly_name }}
☐	Option 2: {{ custom_values.response_rep_first_name }} here, it looks like I missed your call, but I want to get you help asap, what were you calling for, or how can I help? - {{ custom_values.company_friendly_name }}

☐	Option 3: Hey this is {{ custom_values.response_rep_first_name }}! Sorry we missed your call. How can we best help? - {{ custom_values.company_friendly_name }}
☐	Option 4: Hey this is {{ custom_values.response_rep_first_name }}, it looks like we missed you, how can we help you (specifi service)? Or did you have another reason for reaching out? - {{ custom_values.company_friendly_name }}
Notes: Click or tap here to enter text.	

WEBCCHAT

For Chat Bubble

What would you like the messaging for your webchat to be?
<u>Intro Message</u> Examples: a. Got a Question, hit us up right here. We'll get back with you quickly. b. Hey, do you have a question? We're happy to answer, chat us here. c. Just let us know your question below and someone from our team will get right with you. Click or tap here to enter text.
<u>Returning Visitors on Site who have used chat:</u> Example: Welcome back (client name), how can we help you today? Click or tap here to enter text.
<u>Notes:</u> Click or tap here to enter text.

For Widget Window

What would you like the messaging for your widget window to be?				
Header Example: Have a question? Click or tap here to enter text.				
Intro message Example: Enter your question below and a representative will get right back to you. Click or tap here to enter text.				
Email Field: Do you like to add email from the user? <table border="1"><tr><td>☐</td><td>Yes</td><td>☐</td><td>No</td></tr></table> Click or tap here to enter text.	☐	Yes	☐	No
☐	Yes	☐	No	
CTA: Example: Send, Chat Now, Submit Click or tap here to enter text.				
Widget Color Click or tap here to enter text.				
Language Example: English				

Acknowledgement settings

Customer Support contact: Phone or Email Id "Typically: {{ custom_values.lp_phone }}"	Click or tap here to enter text.
Acknowledgement Greeting Example: "Thank You! Please watch your Text Messages for a Reply."	Click or tap here to enter text.
Acknowledgement Message:	Click or tap here to enter text.

Example: "If you didn't leave a textable number, try calling us, or resubmit your 'question with a mobile number."	
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Note:

Response by text:

We got your info over at www.yourdomain.com, we'll be back with you in a bit? Was there any further details you'd like to share?

Click or tap here to enter text.

Voice Mail Message

Record by phone:

- a. Hey this is (owner name) with (company name), I'm sorry we missed you, but feel free to text us on this number with more details, we often can reply by text faster so watch for our response there. Thanks, we'll talk soon.
- b. Hey this is (owner name) with (company name) I'm sorry I missed you, but feel free to text me on this number with more details and watch for my response by text, I'm often faster that way. Thanks, we'll talk soon.

Notes:

Click or tap here to enter text.

Next Steps:

PICK A PHONE NUMBER in the system.

Apply for the a2p

We'll take all this info and build out your webchat, text back automation etc.