

SOP Process to close client

Step 1 After prospecting:

- 1) Want to schedule a intro call via phone-4 Goal is to QUALIFY THEM not Sell Anything
 - If this goes well and it's a good fit you schedule them for Demo call
- 2) Two options
 - They close
 - They don't
- 3) They Close... what to do next
 - A) First send a contract and get paid.
 - B) You schedule an onboarding call within 72 hours (contract must be returned by this call)
- 4) Contract, Payment, Onboarding Form
- 5) Onboarding call:
 - A) We get their fb access
 - B) Set expectation
 - C) Discuss the offer (what the fb offer is going to say)
 - D) Get all employees who are going to be part of this contact information (name,#, email)
 - This info will be used to assign admins in GHL
 - Fill out the VIP Agency White Label Form (get this and customize it for you).
 - E) Going to set up a google drive folder-->share it with them→ get access to photos,videos,logos, testimonials
 - F) Understand your clients ideal customers
 - G) Get radius/towns they want customers from
 - H) Then schedule a launch call 7-10 (based on deliverables) days later
 - I) List of competitors
- 5) After the onboarding call
 - A) Set up Ghl Account for client (**Follow this SOP:**
https://docs.google.com/document/d/1xWg4sD4M3108HPnkG-8h4_1A4V3I3glBmSn1ezUTk0w/edit?usp=sharing)
 - Integrate fb/google
 - Create triggers & campaigns
 - Create/customize pipeline steps
 - Create/customize funnel & form in the funnel
 - Test it out (funnel)

B) Get into their fb account

<https://www.loom.com/share/0b6b7656ac3b42b888f653d075cfe0a9>

C) Set up campaigns including images/ad copy/pixel/ lead forms etc

6) Launch call

- Show client the funnel/ walk through client and staff GHL. Show them how to use it and how to move around their leads
- **DON'T SHOW THEM THE AD'S on fb**
- Give them their Logins for GHL