What is the CSM Welcome Call

The CSM Welcome Call is the first meeting to kick things off with the new client and make sure everyone's on the same page for onboarding our new agent(s) and establishing our partnership.

Once the Sales Team sends over the introduction email, you as the CSM will take it from here and set up this call. You can use the language below to respond to the Sales Team's email and schedule the call with the client. *Please note, all of our macros are also stored in Hubspot and feel free to adjust this language to make it your own. This is the first team we're meeting with the client so it should be fun and personable!*

Thanks for the intro **[Sales Rep First Name]**!

Pleasure to connect with you **[Client First Name]**. My name is **[First Name of CSM]** and I will be your primary point of contact at TalentPop from this point forward — we are excited to meet you and to begin working with your team! I am a big fan of **(Brand Name)** and **(share a sentence or two on why you're excited to work with the brand).**

I would love to set up a Welcome Call with you to review the next steps of our onboarding process and align on expectations and our timeline. Do you have availability this week for a quick call? Please use the link below to book a time convenient for you:

[INCLUDE CALENDLY LINK TO BOOK CALL]

Thanks so much and I'm looking forward to meeting you soon!

Who Attends This Call:

- Customer Success Manager
- Client (All Necessary Parties from their team; you can normally just invite who is on the Intro Email)
- Onboarding Specialist

Pre-Welcome Call Checklist

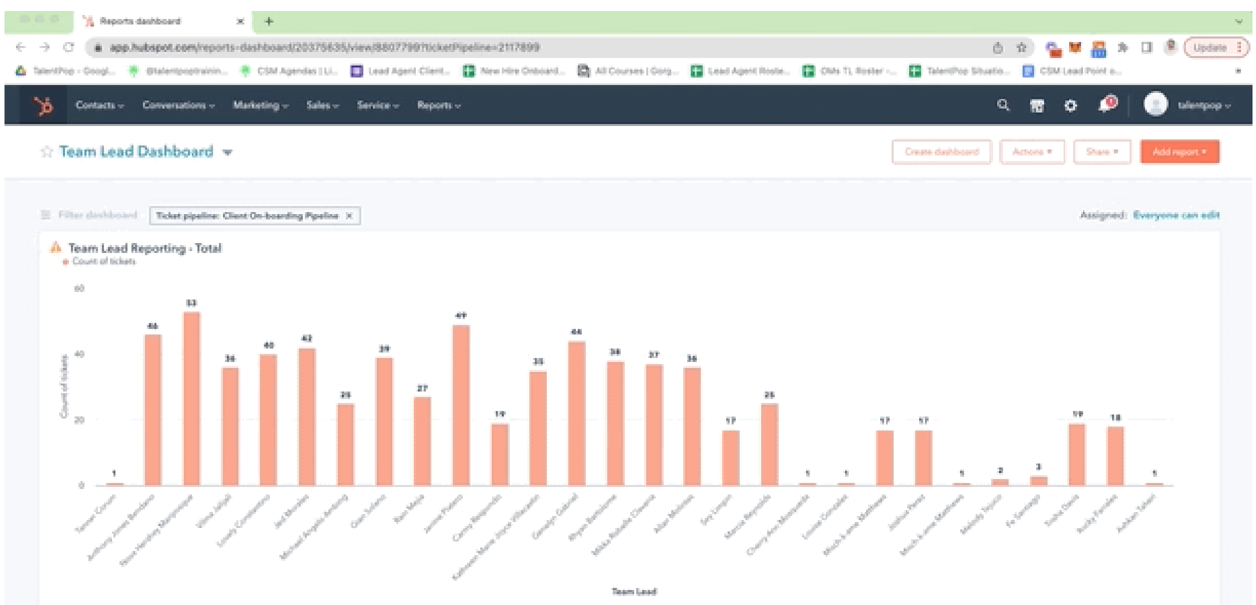
- [ ] Review Clients Ticket within Hubspot

1. To find this, go to www.hubspot.com and login, go to
    a. ***Service→Tickets***
    b. access the ***Client On-boarding Pipeline***
    c. ***Type in Client's Name in Search Box***
    d. ***Click on Their Ticket***

2. Once within the client ticket, you will want to review information on the left hand side; **ANY CHANGES MADE TO TICKET WILL NEED TO BE SAVED**

3. *PRO TIP:* In the client Hubspot Ticket, you can also review the linked Fathom recording from the Onboarding Review Call. This isn't necessary, but could be insightful for additional on the client's needs/expectations.

GOAL: The goal here is to ensure that the information on the client ticket is as detailed as we may want it to be! There may be things you hear from the Sales Call you may want to include to help the recruitment team assist in finding the best candidate.

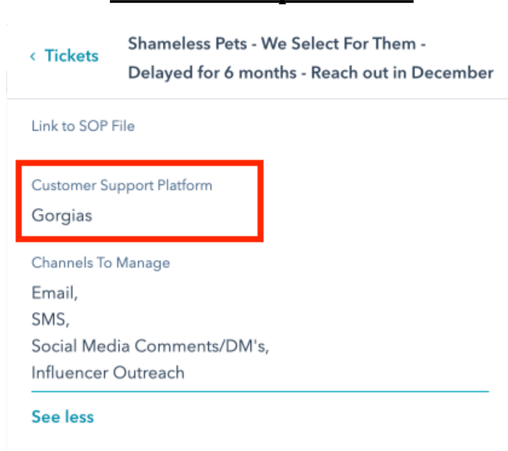


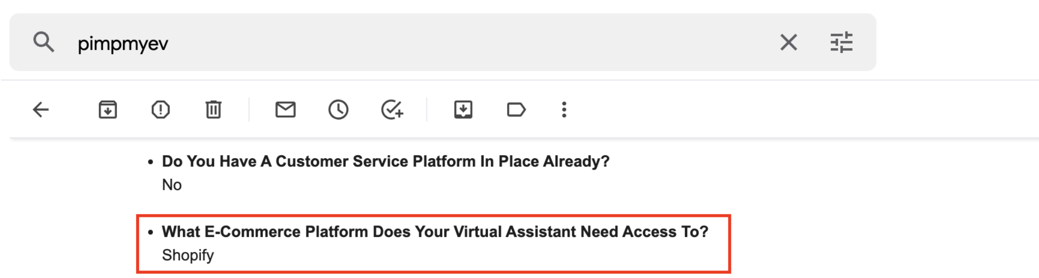
- [ ] Review Clients Website to familiarize yourself more with their brand and the product/service they are providing to their customers

- [ ] Confirm with Onboarding Specialist to see if we have access to clients Shopify account and CS Platform
    - Information relating to client tools we will be needing to have access to can be found within their Hubspot ticket on the left hand side.
    - **Please note,** that this is something that our Onboarding Specialist will request on our behalf if the client has not provided this to us after the sales call. IS can also support here if needed.
    - If we don't have access, the client can share access to Team@talentpop.co

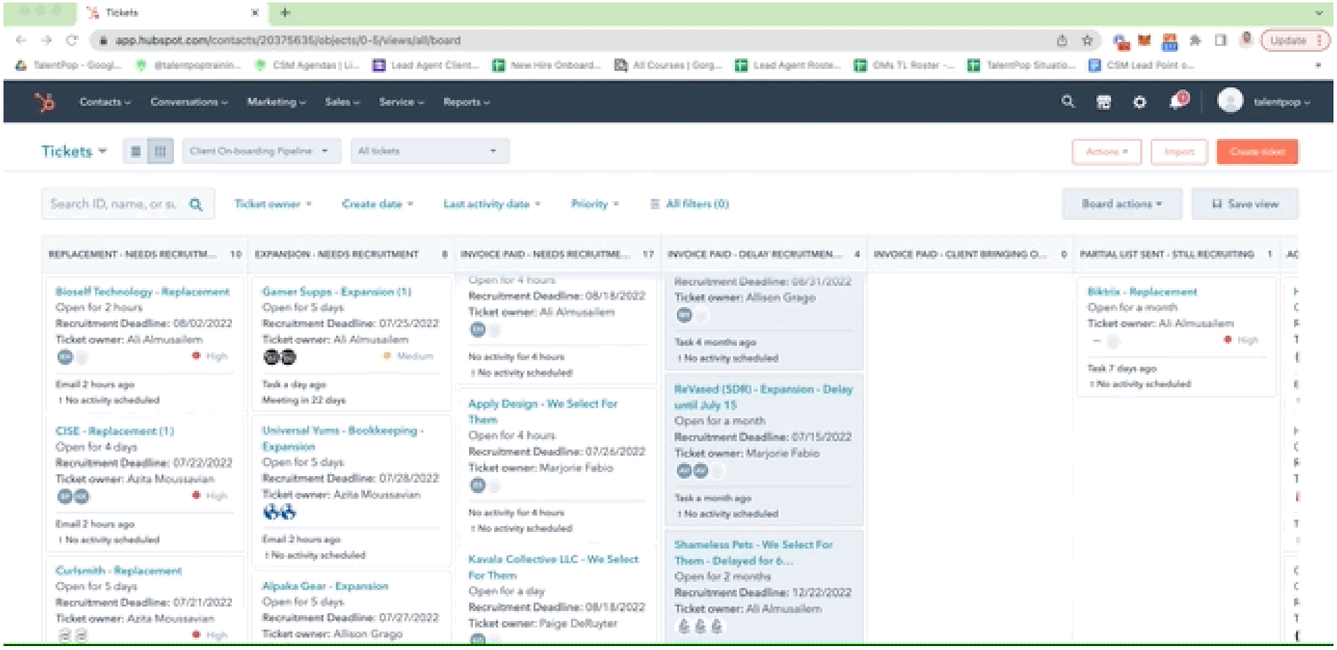
GOAL: Our goal here is to ensure that our team has the basic access points so that we can begin assisting with build out of the Wiki File and review closed tickets; OBS needs to have access to CS Platform to be able to prepare this for client review. ***In the event we do not have this prior to CSM Welcome Call***, this is something we will want to request from our client.

Within Hubspot Ticket





- [ ] Review Welcome Deck prior to call with the client
    - Prior to your Welcome Call with the client, you will want to do a quick review over the presentation deck that can be found within the client on-boarding ticket; this link can be found within the left hand side of their ticket
        - *For the most part, the deck should be good to go, but we may consider updating these slides based on where we are with the recruitment process, updating working hours, and possibly the next steps.*



- [ ] Send a Post-Call Recap Email to Client
    1. Copy of Welcome Call Deck
    2. Shared Google Drive Folder
    3. Reminder for any pending access we need
    4. Important notes from call
    5. Attach [FAQ Page]

For this follow up email you can use the template below:

Hi **[CLIENT NAME]**,

Thanks so much again for joining the Welcome Call earlier. It was great to learn more about **[BRAND]** and where you guys are at now with your business.

I am super excited to be working with you throughout our working relationship and ensuring we can support you every step of the way!

As promised, attached is the presentation for your reference on our next steps of the Onboarding Process, and here is the link to our shared Google Drive folder:
[URL HERE]

To prepare for your new agent, could you kindly:
[insert bulleted notes taken from the call]

[RM] from our recruitment team will be in touch over the next few days with updates on the status of your new agent. **@Onboarding Specialist First Name** and I will be following up as soon as your agent completes Internal Training.

Please let me know if you have any questions in the meantime, and I look forward to supporting your team!