# CRO Client Kickoff Process

## 1. New Biz - just CRO

**Step 1:** Client Signed

**Step 2:** Staffing of the account

    i.    Client insight:

        1.    Personality, savviness, background, any type of similar details will be incredibly helpful to find the right match within our team.

    ii.    Technology they use:

        1.    Shopify, Wordpress, Angular, Monetate, etc.

    iii.    Monthly retainer cost for CRO

    **Owner: Danielle Coulet**

**Step 3:** Send kickoff note

    **Owner: Ned MacPherson**

    iv.    Team intros

    v.    Access request

        1.    Shopify Partners

        2.    Klaviyo or ESP

        3.    GA4 - analytics@powerdigitalmarketinginc.com

        4.    GTM

    vi.    Assets request

        1.    Brand guidelines

        2.    Style Guide

        3.    Photos

        4.    Videos

        5.    Fonts

        6.    Logos

    vii.    Determine communication channel

        1.    Slack or email

**Step 4:** Schedule Kickoff call/weekly Growth Status

    i.    Both kickoff and weekly growth calls will need 1 hr

**Step 5:** Kickoff meeting

    i.    Team Introductions

    ii.    Introduction to Growth Deck

    iii.    Audits (GA4, web & email)

    iv.    Analytics

    v.    Ideation

## 2. New Biz - cross channel with CRO

**Step 1:** Client Signed

**Step 2:** Staffing of the account through slack channel #incomingaccounts

    i. Client insight:
        1. Personality, savviness, background, any type of similar details will be incredibly helpful to find the right match within our team.

    ii. Technology they use:
        1. Shopify, Wordpress, Angular, Monetate, etc.

    iii. Monthly retainer cost for CRO - included in the Blueprint

    iv. Staffing Owners: Nash and Dani Coulet

**Step 3:** Internal Kickoff

    i. Power Digital Account Manager owns kickoff process

    ii. Needs for CRO: accesses & assets:
        1. GA, GTM, Heatmap tool, AB testing tool, etc.
        2. Any assets like fonts, images, style guides, etc.

**Step 4:** External Client Kickoff

    i. CRO team intros: CRO Growth Lead and CRO AM

    ii. Have a slide for general PDM kick-off which will contain a roadmap of CRO

**Step 5:** Schedule a separate deep dive CRO kickoff following the general kickoff meeting.

**Step 6:** CRO Deep Dive Kickoff meeting

    i. Team Introductions
    ii. Introduction to Growth Deck
    iii. Audits (GA4, web & email)
    iv. Analytics
    v. Ideation

## 3. Service Expansion Kickoff Process - Adding CRO to PDM Client

**Step 1:** Client upsell signed

**Step 2:** Staffing of the account through slack channel #service-expansion-staffing

    i. Client insight:
        1. Personality, savviness, background, any type of similar details will be incredibly helpful to find the right match within our team.

    ii. Technology they use:
        1. Shopify, Wordpress, Angular, Monetate, etc.

    iii. Monthly retainer cost for CRO - included in Blueprint

          iv.      Staffing Owners: Nash and Dani Coulet

**Step 3:** Internal kickoff and download with existing AD and AM
          v.      Existing accesses & assets:
               1.  GA, GTM, Heatmap tool, AB testing tool, etc.
               2.  Any assets like fonts, images, style guides, etc.
          vi.    Add CRO leadership team needed to all client calls and slack channels

**Step 4:** Schedule deep dive CRO kickoff

**Step 5:** Kickoff meeting (1 hr)
          i.      Team Introductions
          ii.     Introduction to Growth Deck
          iii.    Audits (GA4, web & email)
          iv.    Analytics
          v.     Ideation

# CRO Client Onboarding Needs

1. **Client insight:**
   a. Personality, savviness, background, any type of similar details will be incredibly helpful to find the right match within our team.

2. **Technology they use:**
   a. Shopify, Wordpress, Angular, Monetate, etc.

3. **Monthly retainer cost for CRO**

4. **Kickoff Date**

5. **Existing accesses & assets:**
   a. GA, GTM, Heatmap tool, AB testing tool, etc.
   b. Any assets like fonts, images, style guides, etc.

6. **CRO team needed on all client calls and slack channels:**
   a. Danielle Coulet
   b. Nashla Akel
   c. Daniela Cortesia (Slack only)
   d. GL & AM assigned to the account (this will come later when it's being staffed)