



Powerful. Affordable.
Marketing Automation.

Happier Clients, Higher Profits

How to Create a Client Onboarding Process at
Your Agency



Brett Tobin

Director of Onboarding | SharpSpring



Karl Sakas

Agency Consultant | Sakas & Company

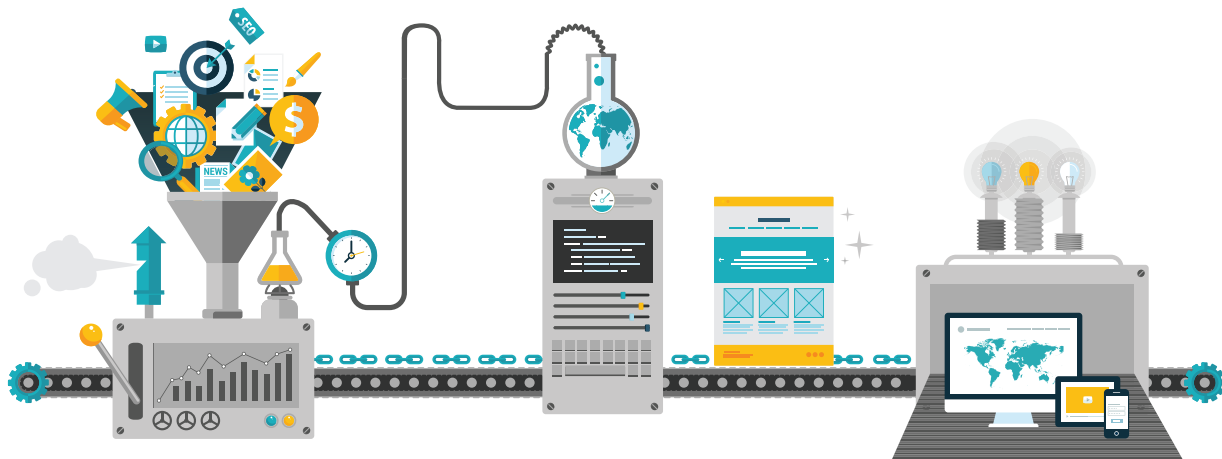
Greetings

Who's In The Audience

- SharpSpring Partner Agencies
- Agencies Considering SharpSpring
- In-House Marketing Professionals

Why Are We Here?

- Learn how to optimize the client onboarding process
 - Share marketing best practices
 - Provide real-world stories



Housekeeping

Questions?

- Phone lines are muted
- Submit via:
 - Chat Box
 - Twitter: #SharpTweet or @SharpSpring

Webinar Recording & Slides

- Emailed after webinar

Webinar Survey

- We need your feedback

Upcoming SpringBoard Live – Partners Only:

Streamline Your Press Release Distribution

Friday, March 24, 2017

Upcoming Webinar:

Leverage Offshore Resources to Expand Your Agency

Wednesday April 12, 2017

Future Partner Presenters:

Email Nicole Levy at nicole@sharpspring.com



Introductions



Brett Tobin

DIRECTOR OF ONBOARDING | SharpSpring

As Director of Onboarding at SharpSpring, Brett works with a team of specialists to deliver a comprehensive and flexible training program for new partners. He's an avid believer in the value of marketing automation and is dedicated to helping partners achieve long-term success.



Karl Sakas

AGENCY CONSULTANT | Sakas & Company

[Karl Sakas](#) ([@KarlSakas](#)) is an "agency process geek" who helps agency leaders solve their biggest business problems. He's advised agencies on six continents about operations, strategy, and leadership. An international speaker, Karl is the author of *Made to Lead*, *The In-Demand Marketing Agency*, and 200+ articles on agency management.



#SharpTweet live with us



Happier Clients, Higher Profits

How to Create a Client Onboarding Process at Your Agency

Presenter: Karl Sakas

- “Agency process geek” on six continents.
- In digital since dialup and IE3.
- Overcome human nature, using processes in agency operations, strategy, and leadership.

Teaser:

Bonuses at the End



Story: **The Olympic Athlete**

Why Client Onboarding Matters

- Profitability
- Shorter Sales Cycles
- Client Satisfaction
- Team Satisfaction

Want to grow your agency? Pick from two options:

- 1. New clients (newbiz)**
- 2. Current clients (upsells)**

(Or acquire another agency... beyond today's scope!)

The Problem with Unhappy Clients

1. If a current client is unhappy, they won't spend more money... and may fire you.
2. If a new client isn't happy, they'll eventually fire you, too.

Long-Term Pipeline Growth

- Thought Leadership + Marketing Automation
- See an immediate impact from onboarding

Poll

What is your client onboarding process like now? (pick 1)

- A. We don't have much of a process.
- B. We have some process, like an onboarding checklist.
- C. We have (and consistently practice) a comprehensive onboarding process.

Typical results

- No Onboarding Process: **20%**
- Some Onboarding Process: **60%**
- Extensive Onboarding Process: **20%**

Three Parts to a **Strategic** Onboarding Process

1. Client Experience (CX)

2. Boundaries

3. Logistics

1) Client Experience (CX)

- Warmth & Competence
- Help clients “manage up”
- Safety Valve

2) Boundaries

- Manage expectations
- Use policies
- Manage scope: “Would you like an estimate for that?”

3) Logistics

- Clients like structure
- Have checklists & templates for legal, communications, PM, billing
- Powerful tool: Pre-kickoff survey

“Next Practice”: Pre-kickoff surveys

- Definition of success
- Past agency experience
- Communications preferences
- More: sakasandcompany.com/pre-kickoff-survey

Onboarding Clients to Marketing Automation: The Tech Talk

- What's in the stack?
- Orientation
- Inform, don't overwhelm

Best practices for agencies introducing new tech to clients

- Hands-on vs. hands-off

Full Onboarding

How many tools are you onboarding?

- Spread them out
- Sessions for each




Onboarding Introductory Call

 Attendees: Agency Principal & Director of Onboarding


- ✓ **Call Objectives:** Review agency goals, give overview of the onboarding process, clarify expectations & discuss next steps

Kick-off Call

 Attendees: Agency Principal, All Key Team Members


- ✓ **Call Objectives:**
This session focuses on providing an overview of the SharpSpring application and helping with completion of the basic setup.

Integration

 Attendees: Agency Principal, Tech Resource, Agency Developer


- ✓ **Call Objectives:**
Complete SharpSpring setup by integrating with the tools/systems you currently use. Will require a team member with access to your domain.

Configuration

 Attendees: Agency Principal, Key User(s)


- ✓ **Call Objectives:**
Work with your Onboarding Specialist to set up your data and customize your SharpSpring instance.

Partner Enablement

 Attendees: Agency Principal, Sales & Marketing


- ✓ **Call Objectives:** Review resources including the Magic Trick, Agency Sandbox, rebrandable sales materials, white papers and other tools available to assist you.

Selling SharpSpring

 Attendees: Agency Principal, Sales & Marketing

- ✓ **Call Objectives:** An in-depth session on how to sell the SharpSpring application to your clients. This call is best suited for team members who will be directly selling to clients or who will be managing client instances.

Joint Sales Demo

 Attendees: Sales Team, Prospective Clients

- ✓ **Call Objectives:** A high level sales demonstration for your potential client(s), leveraging your Onboarding Specialist's knowledge of SharpSpring. (Can be repeated as required).

Additional training calls continued on next page.

Onboarding Exit Call

 Attendees: Agency Principal & Director of Onboarding

- ✓ **Call Objectives:** A review of the onboarding process and an introduction to SharpSpring's Customer Success Team.

Poll

Would you like more information from Karl and/or SharpSpring?

- A. Info from Karl Sakas
- B. Info from SharpSpring
- C. I'd like a SharpSpring demo
- D. No thanks

Recap:

Strategic Onboarding Covers Three Topics



- **Client Experience (CX)**, including Warmth & Competence
- **Boundaries**, including expectations management
- **Logistics**, including pre-kickoff survey

Bonuses

- Karl's eBook on creating a client onboarding process
- 5 random attendees get signed paperback copy of Karl's *Made to Lead: A Pocket Guide to Managing Marketing & Creative Agencies*

Challenge:

Make *One* Change



SAKAS
AND COMPANY



Questions?



#SharpTweet live with us



SharpSpring

Continue The Conversation

With SharpSpring:

Questions?

Email sharpspring@sharpspring.com

Want to see more?

Request a demo on www.sharpspring.com

SharpSpring Partners:

Got a great success story?

Email ideas to nicole@sharpspring.com

With Brett:



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