Twitter Thread by Nick Abraham

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Thread

■ How To Automate Your Client Onboarding Process ■

so onboarding for every agency looks different depending on what you sell as a service but in this thread I'll go over three things that most agencies will do

- communication channels
- project management
- managing vendors

So this is what we're using for our onboarding tech stack

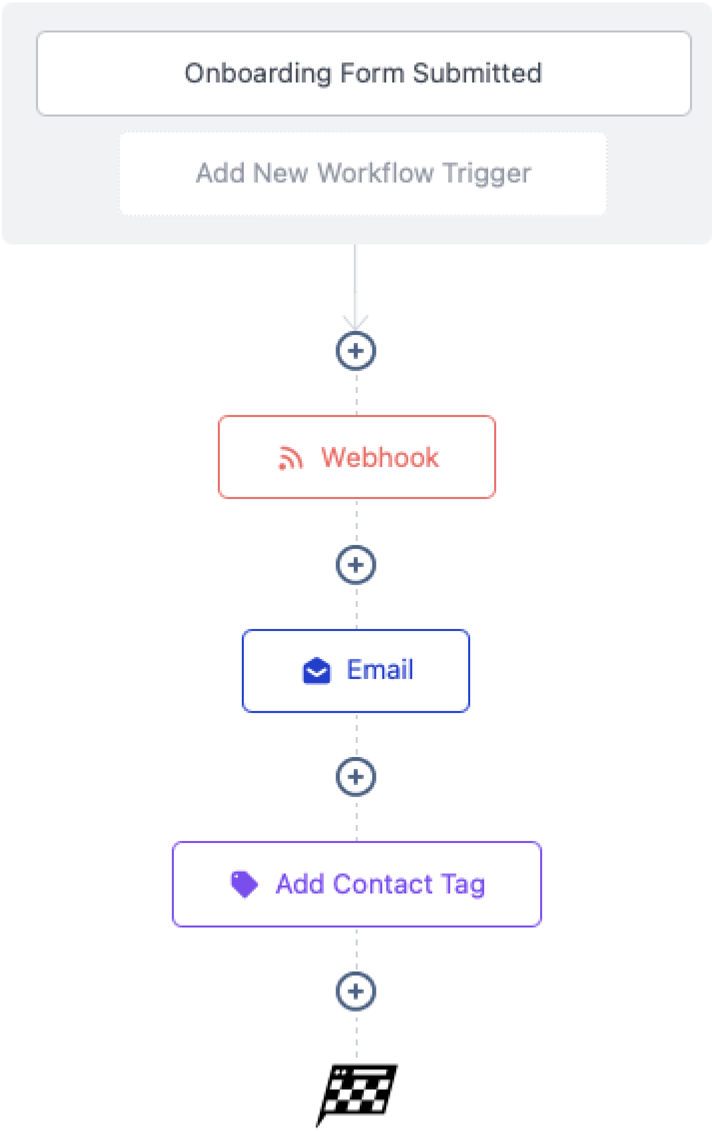
- go high level
- zapier
- google drive
- slack

1) ONBOARDING FORM

You absolutely need this so you can create zaps and workflows

This is where the information is inputted so that you can automate the output (drive folder, slack messages etc)

The webhook is setting off everything in Zapier



- create your onboarding form in gohighlevel and attach to a subdomain
- include questions regarding things that vendors require to get their job done
- get contact information
- anything else that you need to perform

First Name *

First Name

Last Name *

Last Name

Email *

Email

Phone *

Phone

Organization

Organization

Website

Web URL goes here

Address

Address

City

City

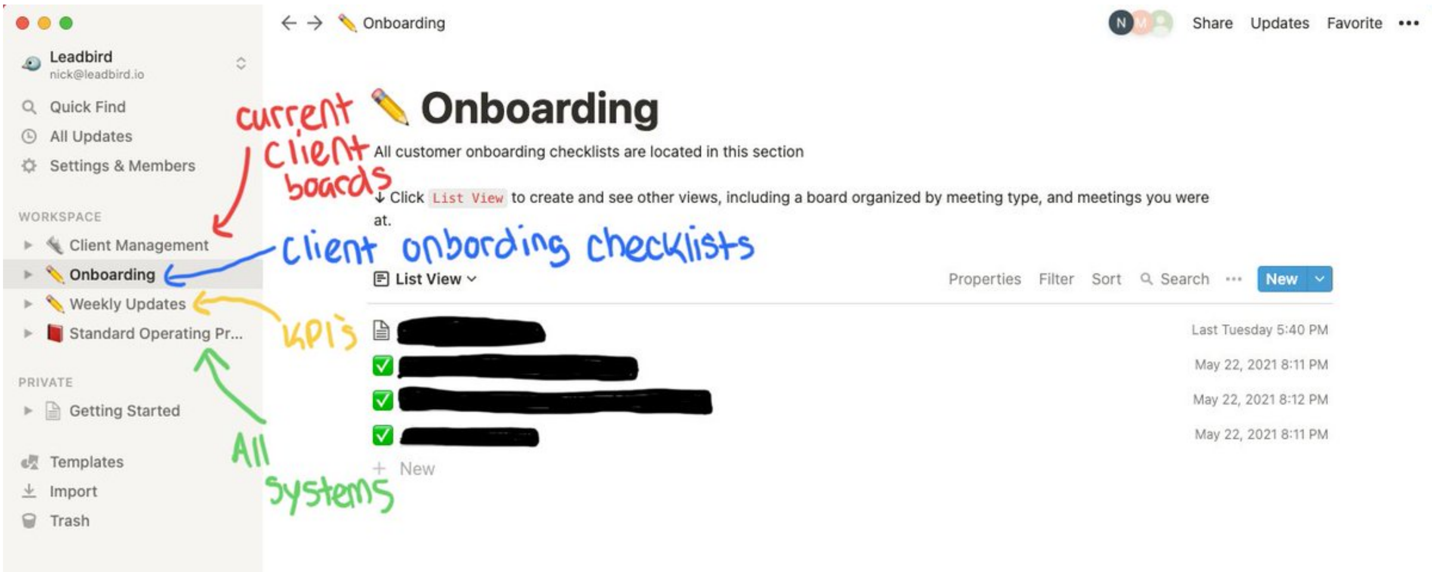
State

State

2) Project Management

We use Notion for project management and with the new Zapier updates we can automate a ton of the work

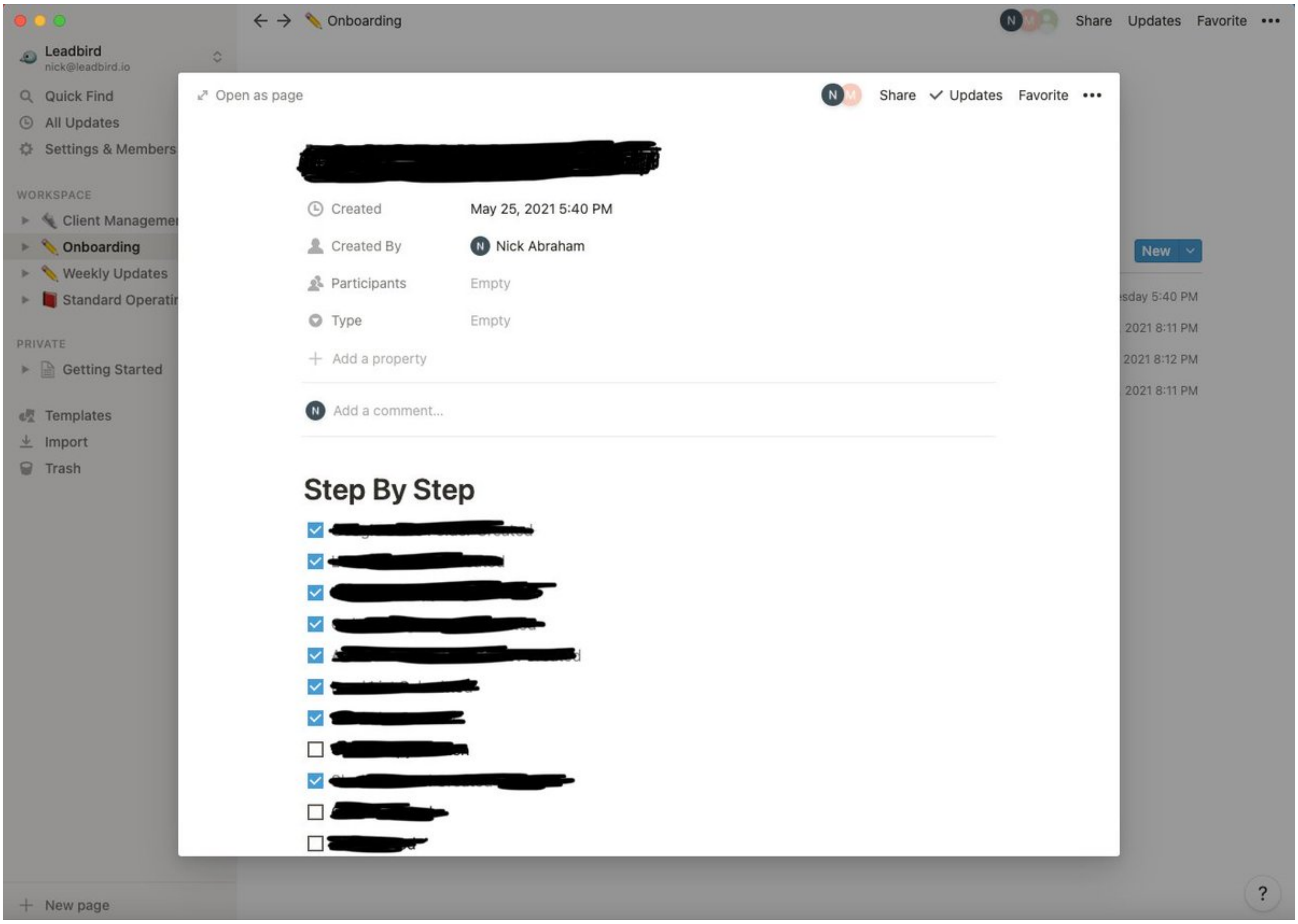
This is how our workspace is built so our team can communicate and work accordingly



So when that onboarding form is filled out

- an onboarding checklist is created
- they're added to our client board

Now our account managers can get to work

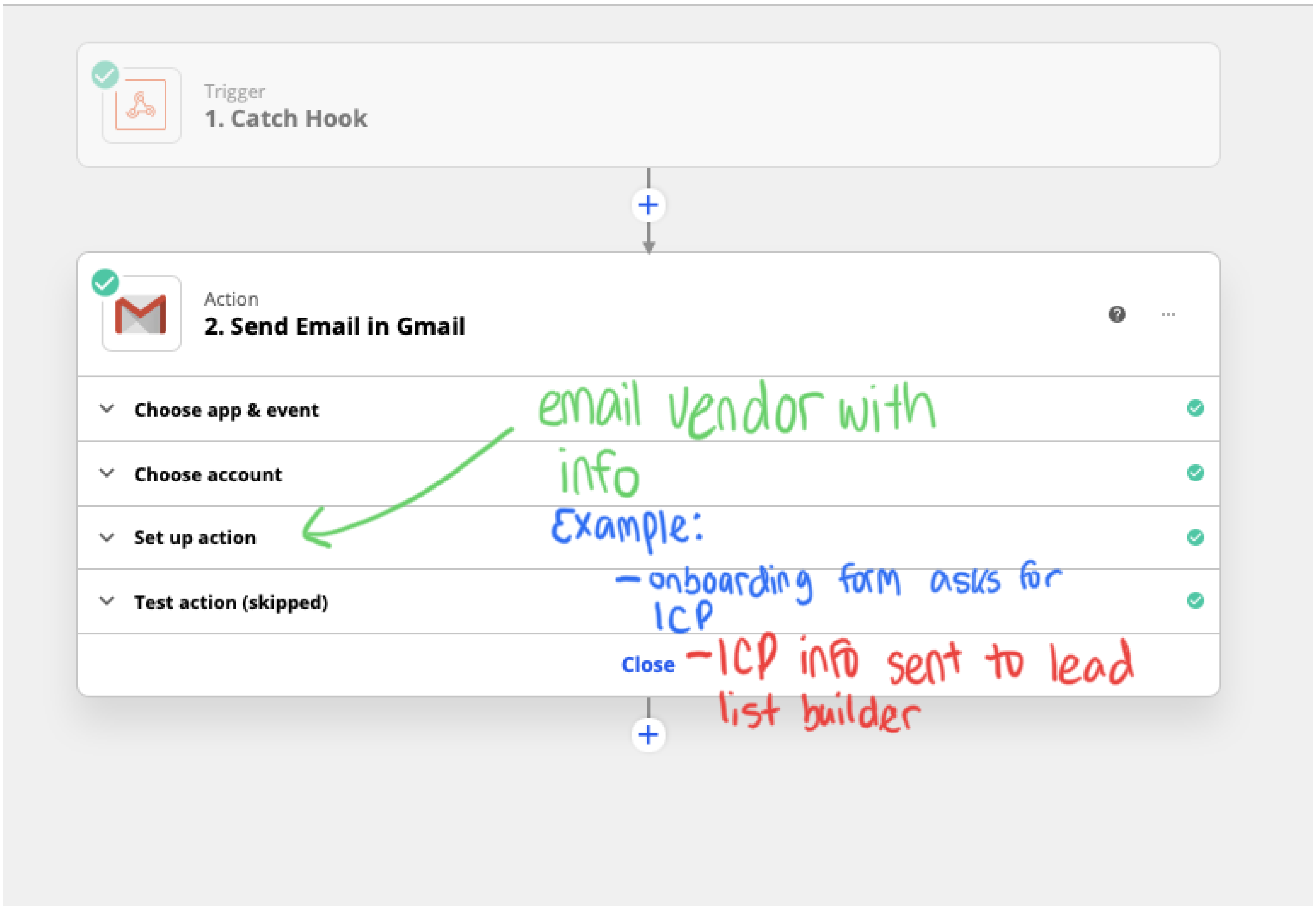


3) Managing vendors

Most agencies have vendors that they use for multiple things

We use two vendors for our service (an ISA team and a lead list builder)

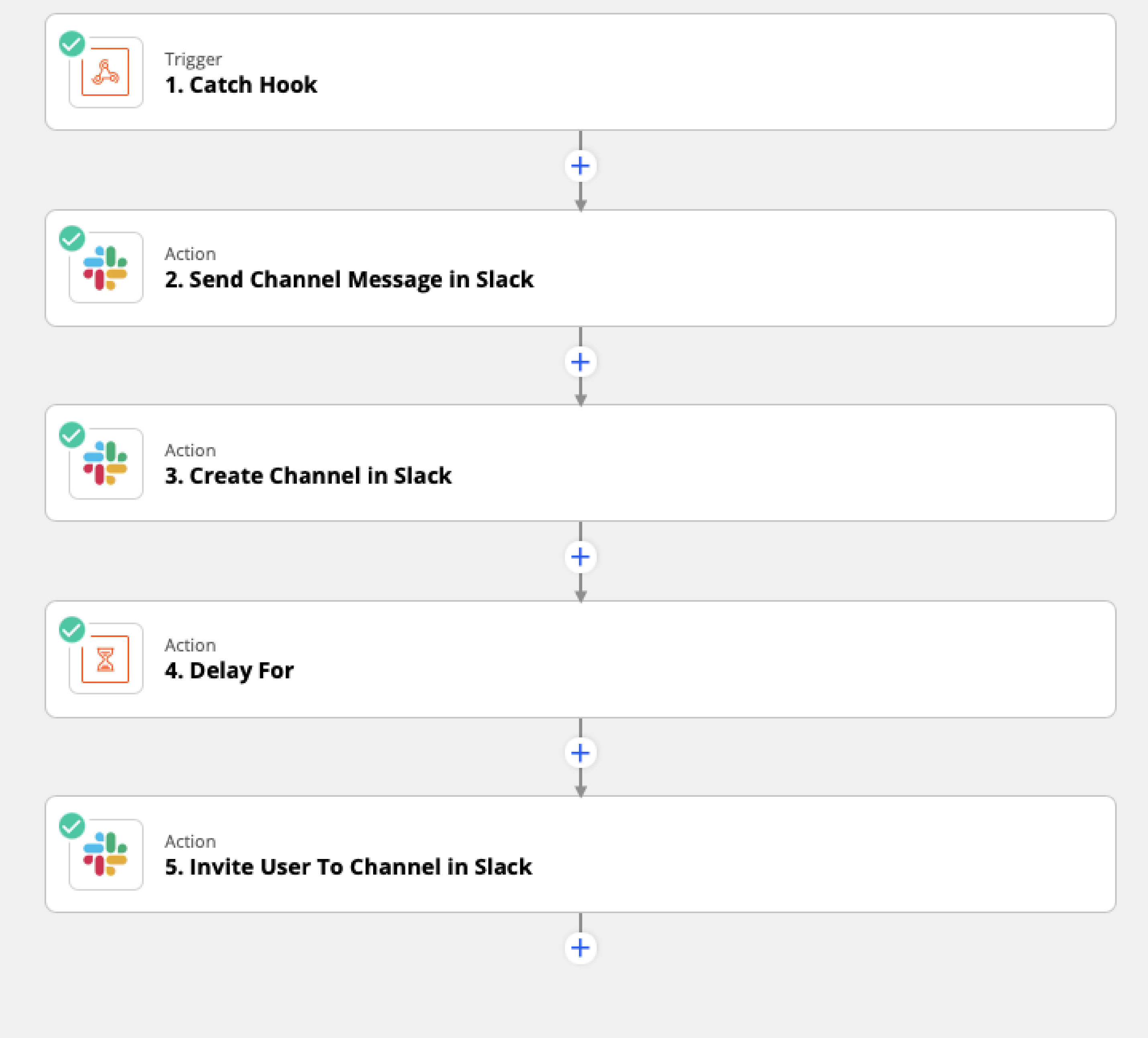
So as soon as that form is submitted. an email is sent out to our vendors with the info they need to start



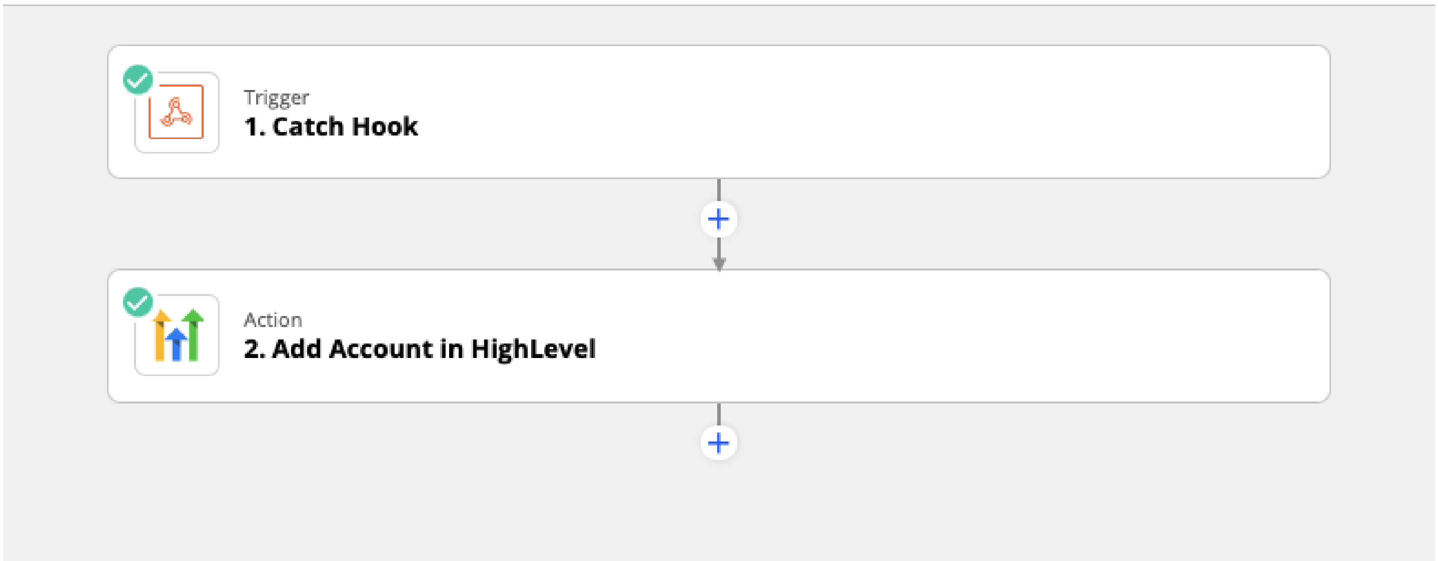
4) Client communications

I think as soon as you pass the 30 clients point, you should switch to a ticketing system (https://t.co/SOibF7azMd)

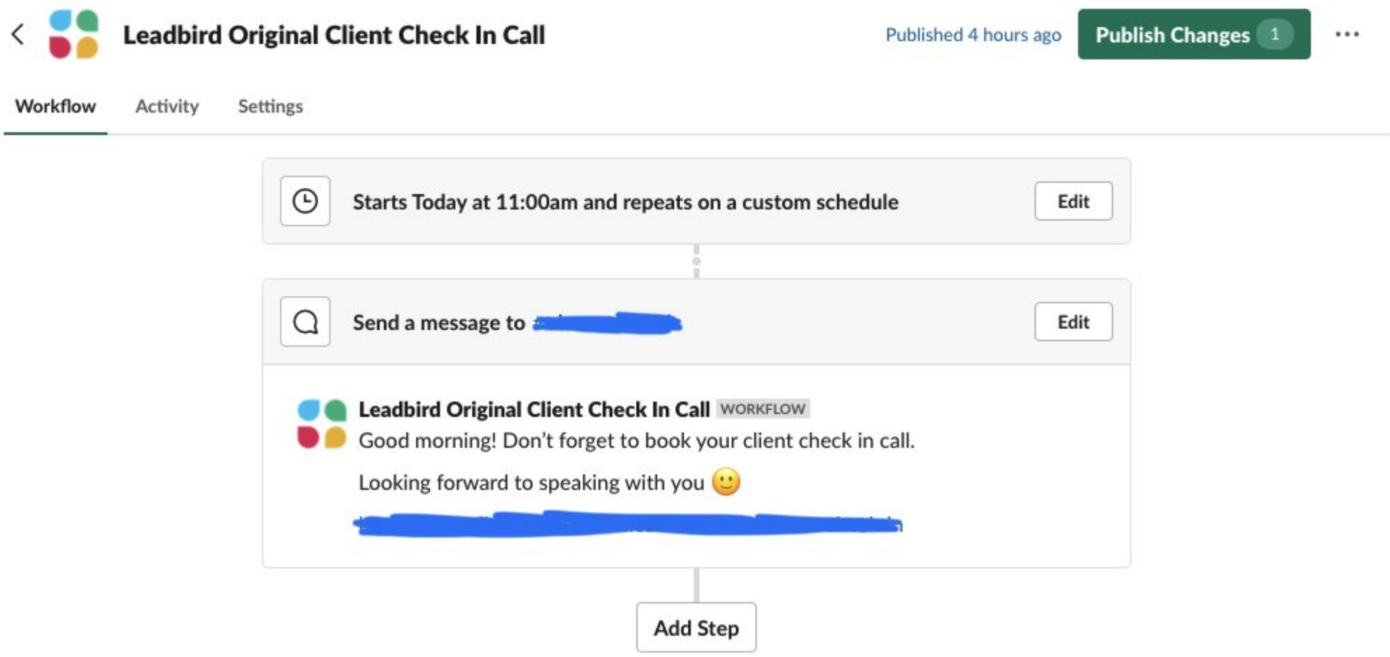
But if you're not there then I would create shared channels within slack to communicate with them



5) EXTRA: We need our clients to have CRMs since we do B2B lead gen so if they select no within the onboarding form we have a zap that will auto create a CRM for them



6) EXTRA: We do a client checkup call once a month so we setup a workflow within slack that sends them a reminder to book the call on the first of every month



I can almost promise that nobody on this side of twitter has better systems or results then my agency ■ we'll be at 50 clients before the end of the month and a hundred before the end of the year