Twitter Thread by BEACTA ■ | utopian



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Onboarding funnel fundamentals:

> Account access
> Customer profile
> Competition
> Brand identity and guidelines
> Reporting

Optional:
> Content calendar (if applies)
> Promos

LET'S GO >

Why you need to go hard on this?

You need to show your value immediately.

There must not be any 'guesswork' or asking nitty griddy questions every few hours.

You need to be fast, efficient and COMPLIANT.

CEO won't be there every day to answer you.

*I'm leaving out the invoicing/billing thing out of this. Figure that out in the contract.

1. Account access

What tools do you use and how does your client add you as a user and what permissions do you need?
Bonus points if you are agency partner with whatever tool you use.

2. Customer profile

Target persona - ASL, what their mom sings to them before sleep, last time they ate mac n cheese... kek

Age, gender, location, relationship status, pain points, needs, wants, why do they buy from you, what problems do they have, their beliefs etc.

3. Competition

Who are their top competitors?

SPY THEM

> Email list
> Ads
> Their offer
> Their positioning
> Their target market
> Industry trends
> What makes you different

4. Brand identity

I made a big mistake with this one first time I started. I didn't ask for anything but I rather inspected every element on their website to figure out what fonts and colors they use.

> Get all brand assets you can (photo, video, color palette, font

> Brand essence (what do they want to be known for)
> Accomplishments, rewards, endorsements, in the press
> Experiences
> Sustainability
> Owners personal brand
> Company history
> Supply chain
> Community involvement
> Events
> Packaging
> Producing process

Technicals:
> Primary font, secondary font - when and where to use it
> Brand color palette (HEX codes)
> Logo variations
> Design elements + full checklist if you are allowed to use certain thing

5. Reporting

Your sheet with all the parameters that you will track and show them every month

Important to track progress and show your value. Bonus points if you make infographics. People don't like reading they like pictures.

BONUS:

Promotions

> What types of promotions are they using right now (1+1, Price discount in $ or %, Mix and match, bundles, loyalty programs, free shipping etc...)
> Are customers influenced by those?
> How far are you allowed to go down with the discounts and when exactly?

> Shipping during holidays
> What is their 'standard' discount
> How often to run a sale
> Does loyalty program suit them

BONUS #2:

Content calendar:

> 30,60,90 days ahead
> Type of content - video, blog...
> Promotions
> A system so they can approve the copy and design

BONUS #3:

Content

> What type of content they want you to produce
> How long it should be?
> Frequency?
> Tone of voice
> Resources for content
> Langauge & messaging
> What emotions should content spark?
> How-tos?
> Quizzes & contests

Client onboarding and why you should go hard on it

Retweet the first one thnx

https://t.co/acHVCI8xpo

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— BEACTA \U0001f36c | utopian (@beactaEM) March 20, 2021