

New Client Launch Form

Use this document to guide your conversation with a new client after they sign up and become a live client. This could be done over the phone or live and in person. The idea is to gather all the necessary details to hit the ground running for the client.

[You will want to customize a version of this document for your niche and company!]

CLIENT'S COMPANY NAME:

CLIENT'S FIRST NAME:

INTRODUCTION OF CALL:

Start by thanking them for their business and letting them know how much we are looking forward to working with them. This call will probably run 30-45 minutes and the main objective is to make sure we have all the necessary information to get your program started, get some additional info to ensure we have the right log ins and services to focus on and set your expectations as we launch the program.

"It's nice meeting you. Thanks for taking the time for this call. So to start with, let me make sure I've got all the right contact info for you and the business":

CONFIRMING CONTACT INFORMATION:

Confirm Contact Info (these items should have already been filled out by the client on the New Client Set Up sheet).

- The best # to reach you on going forward is _____
- The best email address to reach you is _____

CONFIRMING Personal info (Name, Address, Phone #) DATA:

Legal Business Name?

Primary Business Phone Number?

- Is this a Physical Landline?
- OR is this a cell phone?
- ALSO does this line have call tracking capability? YES/NO**

Primary Business Address?

- UPS Store?
- Virtual Office?
- True Physical Business Address?
- Residential?
- AND is it being shared with any other business? YES/NO**
- Can you receive mail at this location? YES/NO**

Any additional office locations? YES/NO

Location # 2:

- UPS Store?
- Virtual Office?
- True Physical Business Address?
- Residential?
- AND is it being shared with any other business? YES/NO**
- Can you receive mail at this location? YES/NO**

Location # 3:

- UPS Store?
- Virtual Office?
- True Physical Business Address?
- Residential?
- AND is it being shared with any other business? YES/NO**
- Can you receive mail at this location? YES/NO**

NOTE: **IF CLIENT ASKS** to have any additional locations optimized other than the main address, EACH additional location we work on has an additional monthly cost.

CONFIRMING YOUR CITIES:

Your program comes with up to 3 zip codes (1 primary city and 2 additional sub-cities).

- **Primary City:** _____
 - Sub-city # 1:

 - Sub-city # 2:

 - Sub-city # 3:

ADDITIONAL BUSINESS INFO:

NEXT, I'm going to ask you a series of questions to learn more about the "behind the scenes" of your business:

- Year started? _____
- # of Employees _____
- Are you primarily a buyer's or seller's agent?

OFFICE HOURS:

ALSO, Certain listings will ask us for the office's exact hours of operation... (when someone will be in the office, even if you have a 24/7 answering service). Please provide your actual office hours, below:

- M-F: _____
- Sat: _____
- Sun: _____



“VERY IMPORTANT!! WE CAN’T BEGIN WORK ON YOUR SITE UNTIL WE HAVE”:

Ask client for the client’s Credit Card info and inform them they will be billed on a monthly basis.

Maximize targeted exposure @ \$1200/mo

SERVICES:(for later offers)

which are your top 5 services?

1. _____
2. _____
3. _____
4. _____
5. _____

Any additional services you do that we haven’t covered?

What are your top 3 unique selling propositions?