HUBSPOT PARTNER PUBLICATION

THE NEW CLIENT KICKOFF PLAYBOOK

HOW TO DEVELOP A CLEAR AND ACTION-ORIENTED ONBOARDING PROCESS TO GET RESULTS FOR YOUR CLIENT

INTRODUCTION

WHY ONBOARDING IS IMPORTANT

The contract is signed. You've had the new client celebration within your agency. Everyone is ready to get to work.

It's the beginning of a new — and profitable — relationship.

But you've done this before, and you know that this feeling of excitement and accomplishment can quickly mutate into resentment and stress. The client is unreachable for weeks, or he expects something that wasn't included in the contract.

The relationship becomes confusing and frustrating before you've even sent out the first invoice.

The first 90 days will set the tone for your relationship, and if you hope to retain this client, then you need to prepare and develop an onboarding process that proves you are the right agency.

You can't let the client begin to doubt his decision.

CHAPTER ONE

WHAT IS ONBOARDING

Onboarding is beginning a client engagement with clear action to spur faster results for the client and to establish the agency's leadership and credibility.

By developing a clear and action-oriented onboarding process, your agency can:

1. Capitalize on Momentum — Faster

The wooing you did during the new business process is fresh in your client's mind. You can capitalize on this excitement and extend it by getting your client committed to new projects more quickly.

2. Show Real ROI — Faster

The faster you can get to work, the sooner you will be able to showcase results and prove return on your client's investment in your agency. You don't want to — and you can't — blame the client for lackluster end-of-quarter results.

3. Increase your Retainer — Faster

If you are able to show success early on, then your clients will know they made the right investment. Standing on a solid foundation of results makes it easy to upsell the client on larger scopes of work and additional projects after the initial ramp-up phase.

Client onboarding sets the tone for your relationship. It will clear up any misunderstandings before they become a problem, prevent scope creep, and confirm for the client and his team that he hired the best agency.

CHAPTER TWO

PREPARING FOR THE KICKOFF CALL

Have you ever called a friend to tell them something important only to get lost in what he wanted to tell you? The conversation is endless, and you can't get a word in.

When you finally hang up the phone, you can hardly remember what it was that you wanted to say.

This is how most kickoff calls go. The client is the ringmaster, and you are only able to react to the situation. You end the call with few points to report back to your team, no action items, and a feeling of bewilderment.

You can only lead if you are prepared to run the show.

Start a Dialogue

Within 24 hours of the contract being signed, you need to send an email that will jump start the kickoff process. Don't let the client's to-do list build up to the point where your relationship is categorized under his "Someday" list.

In the message, you should request the available times and dates for a kickoff meeting where all stakeholders can attend within *one week*.

You should outline what type of people need to be on the call, which should include all **content creators**, the technical/**web support**, the person **approving work** and **establishing timelines**, and the **sales professional** who will be handling inbound leads.

The kickoff call should also include those who set the **goals** for the team and **measure** them.

Also, provide an agenda for what will be covered during the meeting.

Kickoff Agenda

1. Introductions
2. Quick recap of the scope of work per the contract
3. Goals, Plans, Challenges, Timeline
4. Marketing Overview
5. Roles & Responsibilities
6. Next Steps & Action Items

New Client Questionnaire

In addition, you can send a list of questions for the client to answer so that you can prepare to ask more in-depth and relevant questions during the meeting.

The kickoff shouldn't be just a recap of what you discussed during the sales stage. Use this time to gain a deeper understanding of the brand and its goals. Workshop ideas and strategies you can get started on right away.

Include these questions in the email to prompt internal discussions on the client-side:

- What tools and platforms are you currently using in your marketing efforts?
- What are your goals? Is this leads, customers, or revenue?
- What is the lifetime value (LTV) of each customer? What is your LTV goal?
- Do you have customer personas? Who is your ideal client?
- How much does it cost you to acquire a customer?
- What ROI have you seen on your current marketing efforts? What are you currently investing in?
- What percentage of your customers is generated through online methods?
- What are the steps in your sales process? What are the common hesitations clients have?
- How do you currently find leads? Do you know what your cost per lead is? Do you know what your lead-to-conversion rate is?

1 INSIDER TIP

"Give them homework. Before the kickoff meeting, provide them with materials they should read over (we like to include an inbound marketing glossary and a customized kickoff letter with next steps and timelines). Also, create a detailed questionnaire that they can fill out ahead of time. This will include a lot of information you need to know about their company, their current lead generation process, their digital marketing, and online presence. Having this information ahead of time will save you a lot of valuable time the day-of."

Dani Buckley | The Center for Sales Strategy | @DANIOBUCKLEY

CHAPTER THREE

THE KICKOFF MEETING

The kickoff meeting is an hour-long conversation with the major stakeholders to get everyone on the same page. This meeting should help you create a marketing plan and define a list of priorities. The kickoff meeting is where you reaffirm the goals uncovered and agreed to during the sales process — it is an extension of this process. And it gives you a new opportunitiy to make sure all parties are aligned to meet the goals.

From this call, you will begin to develop a deeper understand of the strengths, weaknesses, and opportunities present. You will use the key findings to develop a strategic marketing plan that includes:

- Concrete business goals
- A competitive analysis
- A review of the client's previous marketing efforts
- Buyer personas
- How you will define a marketing qualified lead and sales qualified lead
- Established benchmarks
- KPIs you will measure on a monthly, quarterly, and yearly basis
- A detailed inbound marketing strategy, including the services and time alloted for each activity to reach specific goals

This document will be the basis of your work for at least the next three months.

By asking the right questions and setting expectations from the very beginning — during the kickoff meeting — your relationship will be set up for success.

The Kickoff Meeting

Introductions

Give everyone on the call a chance to introduce themselves and explain what their role is. The project team includes both your agency's staff and the client's team, so you better get to know one another. This should also give you insight into each person's expertise, which will come in handy when creating content. The ultimate goal is to build rapport with the group and establish a relationship of collaboration.

Goals

While you may have heard about the client's goals during the sales process, you will now want to actually set goals that are SMART, meaning they need to be:

Specific: Determine the type of goal and get specific. Increasing traffic is not a goal — increasing organic traffic is.

Measurable: Establish how you will track the goals. The client might want to increase brand affinity, but you need to develop a process for measuring and reporting the success — or failure — of a specific goal.

Attainable: Find out the client's previous efforts. Try to benchmark what has been done before so that you can showcase growth.

Realistic: Set expectations. The client may want to see 5,000 leads per month generated, but if his retainer only covers two blog posts per month and he has never had a lead come through his website, then this goal might not be in the realm of possibility.

Timebound: Establish a deadline for achieving these goals. Discuss the amount of time it will take to create and deploy marketing activities and how long it will take to see the benefits of those activities.

Plans

Based on the goals you've established, you can then begin to work out what the tactics for accomplishing those goals will include.

Sample goals:

- Attract X unique visitors per month
- Increase visitor-to-lead conversion rate
- Convert X visitors into leads
- Increase lead-to-customer conversion rate
- Obtain X customers from inbound marketing

Plans for reaching goals:

- Increasing the publishing frequency of the blog
- Developing top of the funnel (TOFU) ebooks and whitepapers
- A/B testing calls-to-action for ebooks
- Using email to nurture leads effectively
- Developing a lead scoring system to identify high opportunity leads

You shouldn't develop a concrete and exhaustive plan during the call, but you can start to outline some tactics that will help the client reach his highest priority goal as soon as possible.

2 INSIDER TIP

"Make it fun — but not silly. The kickoff meeting is the best place to confirm in their minds that they made the right decision choosing you. An engaging experience that sets a visible path to their goals will set the tone for the relationship moving forward."

Tami Wessley | Weidert Group | @TAMIATWEIDERT

Challenges

The challenges section of the call will simply be a starting point of a task list. If you need to increase organic traffic, then you need to develop a keyword strategy. If you want to capture leads from existing assets or offers the client has, then you need to create landing pages and thank you pages. You will refine and hone this list during your post-meeting reporting.

Using this information, develop a chart that outlines the findings and insights from your conversation with the client. Use this when developing your inbound strategy.

Goals	Plans	Challenges
Traffic Goals	Driving more qualified traffic to the website	Developing a keyword strategy
Leads Goals	Capturing website visitors through landing pages	Creating landing pages and calls-to-action
Customers Goals	Nuturing leads through email campaign	Setting up workflows

Timelines

Based on the challenges and goals, you will want to identify high priority items that your team can begin to implement immediately. If the client had a large list of leads, but doesn't know how to qualify them, then the first step might be to set up an email nurturing campaign.

You will also want to discuss if the client has any company-wide goals it needs to meet. If he has quarterly reporting, then you will want to adjust the pace of your projects to reflect this. You need a clear understanding of the results the client wants to see and when he wants to see them.

Marketing Overview

From here, you will want to understand the client's previous marketing efforts. Discuss what marketing efforts the company has tried in the past and what successes or failures he saw. Understand both the traditional and inbound marketing tactics the client has tried, the challenges faced when executing on these, and any return on investment.

You will also want to briefly discuss the company's target customer. A longer discussion to establish or refine the client's buyer personas will be necessary. The main objective is to understand if the client's customers fall into one group, two groups, or many unrelated groups. If his customers fall into more than more group, you will want to add profiling questions to any existing or new forms to begin to segment the client's audience and better understand his buyers.

Roles & Responsibilities

This is a partnership, which means that there are certain things your agency needs to deliver on and there are also some responsibilities on the client end. Who is approving work? Who should your agency contact if there is a problem with billing? Who will create content and how frequently? Get to know the internal structure and processes the client has in place and determine where your agency's work fits in. And don't be afraid to set expectations for the client. You need to show results, which means you will need information, support, and approval from his team.

Technical Checklist

- ✓ How do we install Javascript on the website?
- ✓ How can we setup a subdomain for landing pages or a blog?
- ✓ How can we integrate the client's CRM for closed-loop reporting?
- ✓ How do we make on-page SEO changes?
- ✓ Where can we get the information for social media accounts?

3 INSIDER TIP

"One of the biggest 'gotchas' we all encounter is not handling client expectations early and often. In the sales process we make sure that our prospects understand and are comfortable with what we are proposing, but things can change once the deal gets done. New people, new ideas, new expectations, i.e., the dreaded 'scope creep' In our kickoff meeting we review the signed statement of work in detail and the process we will undertake to execute it. We also set expectations as to how we are going to work together (people, roles, meetings, communications, review and approvals, and goals and KPIs). We ask for their buy-in on all of these factors before the meeting ends. We also periodically review these requirements and methods to make sure nothing has "slipped" in our relationship. Our account lead also makes it a habit to call her principal contact and make sure that everyone's on the same page."

John McTigue | Kuno Creative | @JMCTIGUE

Content Creators Checklist

- Who on your marketing team will be creating content?
- Who from other areas of the business can contribute?
- How frequently can people on this team write content for the blog?
- What industry resources should our agency be up-to-date on?
- Who are the influencers and experts in your industry?
- When is a good time to schedule some training on blogging?

Sales Checklist

- What does your sales process look like currently?
- What is the best way to notify your team of new leads?
- How are you using a CRM to track leads and opportunities?
- What sales content are you using to close deals?
- What are the typical reservations of potential clients?
- Do you currently use a lead-scoring system?
- How can make sure inbound leads are graded appropriately?

Approval & Timeline Checklist

- ✓ Who needs to approve content prior to publishing?
- ✓ Does legal need to be involved?
- ✓ How can we make the review and approval process easier for you?
- ✓ How can we work together to create an appropriate timeline for deliverables?
- ✓ Who needs to be on weekly or monthly project status meetings?
- ✓ How will you be presenting updates to senior-level management?

4 INSIDER TIP

> ***"Review the statement of work together during the kickoff meeting so everyone is on the same page about what is being delivered! Remember that everyone in the room for the kickoff may not have been involved in the entire sales process, so it's important to confirm objectives, deliverables, timelines, and expected results to avoid miscommunication and scope creep."***

Marisa Smith | The Whole Brain Group | @WHOLEBRAINGROUP

Next Steps & Action Items

Every client call or check-in meeting should end with a list of action items and a recap of the discussion items. These should be reviewed by your project team and then emailed to those involved in the project on the client-side after the kickoff call.

The follow-up email should include:

- An overview of the discussion points covered during the kickoff call.
- The collateral and information the client owns and needs to send to the agency — such as the logo, past press releases, newsletters, and marketing materials.
- A request for login details or information for accessing the client's CMS, social media profiles, analytics accounts, and other promotion tools.
- A request for the existing leads database list.
- The date your agency will present a marketing plan that outlines an analysis of previous marketing activities, the strategy for achieving the clients goals, and the activities your agency will execute on in order to attract, convert, close, and delight customers.
- Calendar invite for monthly or weekly status meetings with the appropriate contacts.
- Calendar invite for a persona planning session, content creation training session, or technical training.
- An overview of the marketing tactics your agency will begin working on immediately — more on this next!

5 INSIDER TIP

"It's imperative that you help the client understand that foundational pieces must not be overlooked as you kick off a campaign. Personas, keyword research, triggers, and voice must be established before you begin cranking out content. Without these pieces in place, you're doomed."

Eric Pratt | Revenue River | @ERIC_PRATT

CHAPTER FOUR

3 MARKETING TACTICS YOU CAN BEGIN IMMEDIATELY

Regardless of how long your contract with a client is, getting started as quickly as possible is critical to your long-term success.

Your clients want leads and results, and as you know, creating content, optimizing landing pages, and concepting marketing campaigns isn't easy. In addition, these activities take time to not only complete but to also see results from.

By relying on these three marketing tactics for new client projects, you can focus your team and give them the tools they need to get started immediately — there's no time for questions like, "What do we start with?"

This will establish your agency's leadership and show the client what tactics build a foundation for proven results.

Conduct a Content Audit

You need to gain a deeper understanding of your client's existing content and its performance. What's ranking well? What content is driving conversions? How is this content being used in the client's current marketing activities?

By aggregating and analyzing all the content your client has produced and then categorizing it, you can identify content gaps in your buyer's journey, problems with messaging, topics that perform well, and those that don't gain any traction with readers.

Set up a spreadsheet where you can list:
Title
URL
Content Type/Format
Buyer's Stage
Persona
Topic
Views
Conversion Rate
Links
Notes

Once you've completed the audit, you can:

- Repurpose an old, online company brochure with a new introduction to make it more lead-friendly.
- Modify an existing sales sheet to include product information and relevant trend data.
- Create a list of prospect FAQ's and interview sales folks to get the answers. Create an offer from the transcript.
- Modify existing training materials into a basic how-to manual of best practices.
- If none of the above exist, repackage the client's existing "contact us" page as a request for a strategic consultation or in-person assessment.

Promote Through Email

Everyone has a list. It might be something your client bought or it could be from a tradeshow 6 months ago. It doesn't matter. Find it, and use it to promote whatever your content audit yielded. Regardless of how flimsy it is, the folks on this list have some connection to your client's company. If the offer is any good you're sure to see some percentage of opens, clicks, and conversions. Hand those off to sales, and analyze the rest. Extract insights where you can, and use the potentially low return to reinforce the need for sophisticated email marketing.

You can also:

- Send a survey to determine the subjects your client's contacts care about.
- Email a request to follow the client on social media.
- Analyze the list for information on company size, location, number of employees, etc. Find gaps in the information, and add these questions to your landing page forms.
- Eliminate bad email addresses from the list and use low-deliverability and bounce back numbers to set benchmarks.

6 INSIDER TIP

"Oftentimes, clients start campaigns with an unrealistic set of expectations on how you will produce results for them along with a fundamental lack of knowledge on the content creation process. Making sure they know how you will produce the contract's deliverables and what you will require from them (outlines, edits, reviews, expert additions, etc.) will help smooth out any issues that might come up later in a campaign from an otherwise unsuspecting client.

Marc Herschberger | Revenue River | @MARCHERSCHBERGE

Optimize & Blog

Optimizing pages and creating blog content will begin the process of driving more traffic, which means more leads and eventually, more customers. A plan to make both of these an ongoing priority will help you better your client's online presence and lead generation.

Start with these projects:

- Build a list of all your client's product and service pages. Which ones get the most traffic? The least traffic? Prioritize which to optimize first.
- Look for low-hanging SEO opportunities first. Do they lead their page titles off with their company name? Do they utilize H1 tags?
- Determine a list of topics that are important for the client's industry. Use a keyword tool to determine visits, rank, and difficulty for search terms.
- Use the list of keywords identified for SEO to begin crafting blog titles for the team to begin writing. Start simple: How to's and lists work!
- Create an editorial calendar for all members of the team involved in content creation.

7 INSIDER TIP

"If a client uses marketing industry jargon in discussing her goals and when asking questions, even if she sounds like she knows what she is talking about, make sure you know what the client thinks a term means. Otherwise, you could be talking about two very different concepts."

Alisa Meredith | Scalable Social Media | @ALISAMMEREDITH

CREDITS

CREATED BY

Jami Oetting

As a content strategist at HubSpot, Jami creates content and resources to help agency partners grow their businesses.

She is also the editor of The Agency Post, an online publication where marketing agency professionals can share their point of view to provoke discussion and debate.

INTERACT WITH ME ON TWITTER
@JAMIOETTING

Patrick Shea

As Partner Marketing Manager at HubSpot, Patrick oversees the creation and execution of training and co-marketing programs designed to help HubSpot's Partner Agencies scale and grow their online business.

INTERACT WITH ME ON TWITTER
@MPATRICKSHEA

SUPERCHARGE YOUR AGENCY'S GROWTH.

Say goodbye to unpredictable cash flow and lack of ROI.

And hello to HubSpot.

Bring your marketing world together in one, powerful, integrated system.

Analyze your clients' web traffic and see which sources are generating the most leads.

Track leads with a complete timeline-view of their interactions with your company

TALK TO US TODAY