Checklist To Prepare For Your Second Intake Call

1. On your Second Intake Call, your Client Success Manager will begin defining and outlining your Offer Funnel. You will need to start thinking about which offer you would like to focus on for this funnel.
    - The document titled, "Best Practices of Optimizing Landing Pages" will become a useful tool when you begin to outline content for your Landing Pages.

2. In addition, decide which information you would like to gather in exchange for this offer. These will be your form questions.
    - Some examples include:
        i. Name
        ii. Email
        iii. Phone Number
        iv. How many employees does your company have?
        v. What is your biggest pain point?

3. You will also need to gather a master list of all your contacts.
    - Export your contact list from your CRM
    - Or give your Client Success Manager access to your CRM and they will export the list for you