# LEADS SYSTEM PROJECT CHECKLIST

*Your step-by-step guide to getting a client's Leads System account live and delivering leads.*

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## Your Role

**You manage the client. There's no development build here.**

Your job is to get the client's account live, get them through the mandatory setup, and make sure their first search actually returns leads before you hang up the call.

**Working a Nsite Combo deal? This checklist covers the Leads side only.**

The client also gets the full AI Suite as part of the bundle — coordinate with the AI Suite PM Checklist for that build, since it's a separate workstream with its own steps and timeline.

## The Step-by-Step Process

1. **Confirm signed client + package.**
2. **Confirm the number of users needed — up to the plan's limit.**
3. **Collect the client's business info for setup — name, primary contact, and business category.**
4. **Provision the account** — under the correct package, using the Info Check below so nothing's missing.
5. **Send the client their login and flag the mandatory first-login sequence.** Every account hits the same 3-step flow — Terms of Service, card-on-file (skippable), and Business Profile (not skippable).
6. **Confirm the Business Profile is complete** before the onboarding call — every field is required and there's no working skip path.
7. **Run the onboarding call.** Finish any remaining Business Profile fields live, then run the client's first real search together so leads land on the call.
8. **Show the client how to export leads** — so they can drop results straight into their CRM.
9. **Spot-check the package's Search Types** against what they purchased, so the client isn't missing an included search type.
10. **Run the 30-day check-in.** Review usage and lead volume together, and help them read Balance vs. remaining credits.

## Your Responsibilities

✓ Being the client's main point of contact

- ✓ Collecting setup info and confirming the account is provisioned correctly
- ✓ Getting the client through the mandatory Business Profile step
- ✓ Running the onboarding call and the client’s first live search
- ✓ Showing the client how to export leads into their CRM
- ✓ Running the 30-day check-in

## Info Check — Before the Onboarding Call

*Leads accounts stall at the mandatory Business Profile step if something’s missing. Confirm every item before the onboarding call.*

- ✓ Client name, primary phone, and primary email
- ✓ Package confirmed — Starter, Growth, or Authority (or Nsite Combo Starter/Growth/Authority, if bundled with AI Suite)
- ✓ Number of users needed (within the plan’s limit)
- ✓ Business name and category (for the mandatory Business Profile step)
- ✓ CRM the client wants to export leads into
- ✓ Which Search Types are included on their tier (see the package table)
- ✓ Client’s expectation set on lead delivery — always the range, never a fixed number
- ✓ Awareness that Balance is a spending pool, not a price
- ✓ Login sent, and the 3-step first-login flow flagged in advance
- ✓ Everything confirmed against the Reseller Setup Guide’s package table

## Mandatory Onboarding Flow

> **Every new account hits the same 3-step first login, no matter the package.** (1) Terms of Service, (2) card-on-file setup — skippable, (3) Business Profile — not skippable, every field required. Budget time for step 3 on the call.

## Do Not

- ✗ Promise an exact lead count — always quote the range
- ✗ Let a client skip the onboarding call — Business Profile isn’t optional
- ✗ Confuse Balance with Price — they’re different fields in the platform
- ✗ Promise annual billing — not available yet, pending a platform confirmation
- ✗ Recommend the AI Agent Builder + enrichment combo as margin-safe — a known unresolved billing quirk

## Account Setup & Access

**You collect, Sonia provisions.**

**You collect** the client's setup info and pass it along.

**Sonia handles** creating the account under the correct package in WLS — you don't need platform admin access yourself.

**Note:** The PM fee is separate from — and stacks with — the Connector's sales commission.

## Launch & Client Handoff

At the onboarding call, you finish any remaining setup steps together. Then a **live first search** confirms the account actually works:

- **You run the search live** on the call, so real leads land before you hang up.
- **You show the client** how to export results and drop them into their CRM.
- **You confirm they know how to read their Balance and remaining credits.**

**Training content isn't built yet**

**WLS's in-platform Training Content section is currently blank for the Leads System — your onboarding call is the client's main walkthrough for now.**

**Plan a little more time than a** fully self-service product might need.

## Support After Launch

For help after launch, the client reaches out to their **PM** or **salesperson**, or emails **Contact@NsiteTechStudios.com**.

## Good to Know

A few platform realities worth knowing before you pitch or onboard:

- Every lead delivery is a range, not a fixed count — the Balance enforces a real dollar cap regardless of what mix of actions the client searches
- Wallet top-ups bill at the same marked-up per-action price — there's no separate flat credit rate
- Only Leads Authority includes buyer-intent and influencer data — Starter and Growth don't
- Annual billing isn't offered yet, pending a platform confirmation on how Balance refreshes
- The AI Agent Builder + enrichment combo isn't confirmed margin-safe yet — don't promote it as such

## Success Formula

**A completed Business Profile + a live first search on the call = a client who trusts their leads from day one.**

## Quick Pitch

*“We’ll get your account live, walk you through it together, and make sure real leads are landing in your CRM before we hang up the call.”*

**Helping Businesses Grow. Building Recurring Income Together.**