

ONBOARDING

CALL



PRE-ONBOARDING CHECKLIST

Listen to the sales call recording.

Listen to the sales call recording to understand:

- Client expectations
- Goals and pain points
- Promises made by the sales rep

Review Client Legacy Website

Examine the current website to:

- Understand their products/services
- Identify strengths and areas for improvement
- Prepare genuine compliments for the onboarding call

Review BITRIX

Draft a clear project overview :

- Check if set up fee has been paid
- Client Dream Goal & Client preferences and special request



QA

CHECKLIST

1

You must introduce yourself as a representative from Simple and mention that you are working with the Partner. (It's important to mention the sales rep's name, as most clients only remember them.)

2

Compliment the client's business. (This is why you should review their legacy site—to understand what their business is all about and to provide a genuine compliment.)

3

Discuss the specifics of the website development. (Make sure the client understands the entire process. Emphasize that what we are building is just a draft—nothing is final yet. Explain how long it will take to complete and the steps involved during the development phase.)

4

Verify the client's contact information, including the phone number and email address they want displayed on the website.

5

Confirm the keywords and locations that will be used and optimized for their website.

6

Offer TransUnion and/or AMPIFY as additional tools to enhance their website's performance.

SUGGESTED

SCRIPTS



SUGGESTED ONBOARDING SCRIPT I

Step 1: Introduction

Hi, is this [Client Name]?

Hi [Client Name], this is [Your Name], your Project Manager from Simple. I'm reaching out on behalf of [Sales Rep Name], who you spoke with about getting your website project started. Do you have a few minutes today to go over your website?

Step 2: Rapport & Compliment

"Before we get into it, I actually took a look at your current site, [legacy site name/business], and I wanted to say — [specific genuine compliment: e.g., 'you've got a really solid reputation built up' / 'your service area coverage is impressive' / 'I really liked how straightforward your services are laid out']. It's clear you've put a lot of work into the business." Could you tell me a little about your goals for the website and what's most important to you right now?"

Step 3: Website Process Explanation

"So here's what's going to happen next: our design team is going to build a first draft of your new website. I want to be upfront that this first version is just a starting point — nothing is final, and you'll have the chance to review it and request changes before anything goes live.

Typically, the draft takes about [X business days/weeks] to complete. Once it's ready, I will reach out to walk you through it, and from there we'll go through a revision process together until you're happy with it. Does that make sense so far?"

Step 4: Verify Contact Information

"Great — now I just want to confirm the contact details we'll be displaying on the site. What's the best phone number you'd like listed for customers to reach you?"

And what email address should we display for customer inquiries?"

(Repeat both back to confirm accuracy.)

Step 5: Confirm Keywords and Locations

"Now let's lock in the keywords and service areas we'll be optimizing for. Based on what you shared with [Sales Rep], I have [list keywords] and [list locations/service areas]. Is that accurate?" Anything else we should keep in mind aside from what you already discussed with (Sales Rep) ?

Step 6: Offer TransUnion / AMPIFY

"Last thing — I want to tell you about two add-ons that a lot of our clients find valuable alongside the website build.

The first is **TransUnion Directory Control**. This keeps your business listing — name, address, phone number — accurate and consistent across 60+ major online directories like Google, Yelp, Bing, and others. Inconsistent listings actually hurt your local search ranking, so this helps make sure customers find the correct information about you no matter where they search, and it supports your overall local SEO.

The second is **AMPIFY**. This automatically creates a lightning-fast, mobile-optimized version of your website pages. Most of your customers are going to find you on their phones, and AMPIFY makes sure those pages load instantly, which improves the user experience, helps your SEO, and can improve how many visitors turn into actual leads or customers — all without changing how your site currently looks.

Would you like to add either of those to your plan?"

If client agrees to either add-on: "Great choice. Since this add-on comes with an additional charge, I do need to get your verbal authorization on a recorded portion of this call — is that alright with you?"

(Start/confirm recording per your call system's process.)

[Client Name], can you confirm you'd like to add [TransUnion Directory Control / AMPIFY] to your account, and that you authorize the associated charge of [\$X] on top of your current monthly fee .

(Wait for clear verbal "yes"/confirmation, then proceed.)

"Perfect, thank you — that's confirmed and on file."

If client asks about pausing/removing it later: "We don't do fixed-term contracts, so there's no lock-in period in that sense. That said, this isn't something designed to be turned on and off — it's built to run continuously so your listings stay accurate [or: your mobile pages keep loading fast] over time, since that consistency is what actually drives the SEO benefit. I'd recommend thinking of it as an ongoing part of your online presence rather than something to toggle for just a month or two."

If client declines both: "No problem at all — we can always revisit that down the line if it's something you're interested in. Let's go ahead and finalize the rest of your project."

Step 6: Closing

That's everything on my end. Just to quickly recap: the draft will be ready in [X]. I'll give you at least a day or two to review the draft, and we've confirmed your contact information and keywords, and [add-on] has been set up.

I'll be in touch once the draft is ready. I'll also send you an introductory email so you can add me to your contact list. I'll send you a text message as well, just in case you prefer to communicate that way.

Anything else before we finish up?"

SUGGESTED ONBOARDING SCRIPT 2 Busy / Skeptical Client Flow (Objection-Handling Variant)

Use this version when the client is rushed, distracted, or pushes back early. Keep it tighter and address resistance directly rather than skipping steps.

[Introduction]

"Hi [Client Name], this is [Your Name] with Simple — I'm calling on behalf of [Sales Rep Name], who you spoke with about getting your website project started. I know you're busy, this will only take about [5-10] minutes, and it's important we cover it together. Is now an okay time?"

(If they say "make it quick" — acknowledge and move faster, but don't skip steps.) "Totally understand, I'll keep this efficient."

[Compliment the Business]

"Quickly — I looked at [business name]'s current site before this call, and honestly, [specific compliment]. Wanted to mention that before we dive in."

[Discuss Website Development Specifics]

"Here's the short version: we're building a first draft of your new site — think of it as a starting point, not the final product. You'll get to review it and ask for changes before we connect it to your permanent domain. It'll be ready in about [X]. I will follow up once it's ready. Sound good?" Any additional instructions apart from what you already discussed with (Sales Rep) ?

[Verify Contact Information]

"I just need to confirm two quick things — the phone number and email you want listed on the site for customers."

(Confirm both back quickly.)

[Confirm Keywords and Locations]

"And confirming the keywords and areas we're optimizing for: [list]. Is that accurate ?

[Offer TransUnion / AMPIFY]

If client is rushing you: "One last thing, I promise it's quick — we have two optional add-ons a lot of clients take advantage of. TransUnion keeps your business listing correct across 60+ directories like Google and Yelp, which protects your local search rankings. AMPIFY makes your site load instantly on mobile, which helps both SEO and conversions. Interested in either?"

If client is hesitant/price-sensitive: "I get that — a lot of clients ask about that. Think of it this way: TransUnion is protecting your visibility everywhere customers search for you, and AMPIFY is making sure the mobile version of your site — where most of your traffic comes from — actually converts visitors into customers. It's less of an added cost and more of protecting the investment you're already making in this new site."

If client agrees: "Great — because this comes with an additional charge, I need your verbal okay on a recorded portion of the call. Is that alright?"

(Start/confirm recording.)

"[Client Name], confirming you'd like [TransUnion / AMPIFY] added, and you authorize the charge of [\$X] on top of your current monthly fee"

(Get clear confirmation.)

"Perfect, that's confirmed."

If client says "can I just try it for a couple months and cancel"? "We don't lock you into a contract, but this also isn't structured as a short-term trial — it's meant to run continuously, since the value comes from ongoing consistency [directory listings staying accurate / pages staying fast] rather than a one-time fix. I'd suggest treating it as a standing part of your site rather than something to add and remove."

If client firmly declines: "No worries — we can leave that off for now. Let's get you finalized."

[Closing]

Alright, [Client Name], that covers everything I needed today. Just to recap: your draft will be ready in about [X]. I'll give you at least a day or two to review it, and then I'll give you a call so we can go through everything together.

I'll also send you my contact information so you can reach out to me if you have any questions or concerns. I'll send you a quick text as well, just in case you prefer to communicate that way.

Do you have any questions before we wrap up?

