

WooCommerce Initial Call Checklist

Opening

Greets the customer using the appropriate opening call script  
Sets phone call time frame expectation  
**MUST READ:** State call recording disclaimer  
**MUST READ:** Validate account

Jump To Section >

Business Consultation

Starts Zoom share with customer before reviewing the DCT  
Reviews if customer has an existing website and consults as needed  
Confirms customer CPOA preference  
Reviews business details  
Confirms customer product/service offerings on DCT and asks lead pass questions

Jump To Section >

Design References

Completes Business Personality Quiz unless cloning old site

Jump To Section >

Website Design

Reviews Logo  
Reviews Site Elements

Jump To Section >

Content

Asks the customer about the content they want to include on their site  
Offers copywriting and follows process  
Discusses stock images library and confirms image keywords

Jump To Section >

Woo

Asks what functionality the customer would like on their site  
Reviews payment/shipping/tax settings

Jump To Section >

DCT

Writes DCT instructions clearly and in a way that reflects information gathered on the call  
Writes DCT instructions clearly and in a way that reflects information gathered on the call

Jump To Section >

Time Frames

Sets build time frame expectation  
Explains overall time frame

Jump To Section >

Next Steps + Wrap Up

Reviews Marketing Services  
Reviews Website Design Hub  
Schedules follow-up call  
Sends follow-up email

Jump To Section >

Account Notes

Takes proper account notes in Jira

Jump To Section >

# WooCommerce Initial Call Guide

## Greeting

- Hi, this is **[your name]** from GoDaddy Website Design Services. Is **[customer name]** available? **[PAUSE for response]** How are you today?
- I'm calling you for your website consultation.
- Our call today should take us about **[call time here]**.
- Are you near a computer? You'll need it in a few minutes.

- Before we get into things, I want to let you know that this call will be recorded and retained for quality and training purposes.
- I need to verify into your account. Do you have your **4 digit PIN?** **[PAUSE for response]**

Now that we've got that out of the way --- let's talk about how your team of experts will work together to design your website. We'll also cover how we'll be using your Website Design Hub to communicate what we'll need from you at each milestone. Sound good?

- [PAUSE for response]**
- Today, I'll be handling your consultation call and taking care of scheduling your Review Call. We'll schedule your Review Call at the end of our call.
- After your consultation, I'll be sending over your website design goals and other business info to a member of our Design Team.
- From here, one of our design experts will be brought up to speed about your website design before your Review Call.
- You'll meet with an expert from this team on your Review Call, and they'll go over your website draft with you.
- Any questions so far?

[Verify main point of contact's information]

- [Customer name]**, I want to make sure I have your correct phone number and email address for our communication during this project.
- I have your phone number as **[say phone number]** and your email address as **[say email address]**.
- Is this all still accurate?
- Our overall design process typically takes around 10 weeks. We'll get into more details later in the call.
- Today, our call has 4 basic sections. First we'll talk about your business, then your design options, shop, and then your website content. We will review information about your business and also discuss more about your business and features you will need for your business goals. **[PAUSE for response]**

## Business Consultation

We are going to screen share together today. I just sent you an email with the zoom link, let me know when you get that so that we can get connected.

**[PAUSE for response]**

**[If customer declines Zoom that's okay; the consultation can still be completed over the phone.]**

- No problem! We can still complete your website consultation over the phone. **[PAUSE for response]**
- Let's get into your consultation.

[Send Zoom link to customer so you can enable screenshare.]

[Update Basics Tab information if needed during the review.]

Since we're building your site with woo-commerce, we're going to want to get into all the details, so we'll select this third option here. The time estimate is for the business and design part of the consultation, but we'll have some additional time towards the end to cover your products."

[Please do not forget to cover the following using the DCT:]

- Stock gallery
- Size/Resolution of images provided - High resolution/large images
- Business Personality (if needed)
- Copywriting
- Do's and Don'ts
- For premium review any functionality needed that might be a plug in - <https://features.wdsgallery.com/#features>

[For US customers only - ask Commerce Lead Pass questions in Jira.]

## Payments

- During our revisions call we can help set up your payment processor so you're ready to collect payments when your store goes live.
- Do you have a payment processor now?

**👉 If customer DOES NOT have a payment processor**

**👉 If Paypal, Stripe, Square, Direct Bank Transfer**

We'll also help you set up shipping (USPS or UPS) and tax information ready by that time. I will be sending all this information & instructions for you in an email after our call today.

## Logo Consultation: Customer Purchased Logo Design Service

**👉 Logo Consultation**

## Next Steps + Wrap Up

SIZE	PREMIUM BUILD TIME FRAME
Small	8 Days
Medium (ESM)	14 Days
Large (ESL)	18 Days

- Let's schedule our follow-up call. We're looking at **[site delivery date + 1 day]** to **[site delivery date + 3 days]**, since it takes **[site delivery time frame]** to get your website ready for review. Let's see what options we have here.

**Example: We're looking at the week of August 19th. I have the 19th at 9 am your time, or 10 am....etc"**

**👉 Premium Web Store - Woo without MS**

**👉 Premium Web Store - Woo with MS**

- Great, and we'll email your website to you to review before that call. If you're ready to make it live, you can select this option through your HUB. We'll attempt to publish your site, but we may call you if we need more info and to provide you with the next steps. **[PAUSE for response]**

**[If customer wants to review:]**

- If you have edits to make, or you want to discuss why our designers made certain choices, you add those comments using the annotation tool inside the hub.

**[If needed or has questions about how to reschedule an appointment in hub]**

- After logging into your hub, you should land on your dashboard.
- Click on the Website tab.
- You should see you're in the Design phase.
- Just a quick note that your site will move into the Design phase when we've completed your consultation today.
  - When your website has returned from our build team, you will be able to provide changes two ways:
    - Live during your revisions appointment
    - Prior to your call through your HUB
      - It will direct you to our revisions tool, Altamir.
    - Once you have added your changes through Altamir, your requests will be saved and addressed during the revisions appointment.

- You should see your upcoming appointment info. Go to that card and click on Reschedule.
- A little calendar will open for you --- select the new time and date that works best for you, and that's it!
- Your new appointment info will be posted inside your hub; it should only take a few minutes to see.
- We'll also email you an appointment confirmation.
- Make sure you check your spam and junk mail because this email will come from Calendly.

Great, and we'll email your website to you to review before that call. If you're ready to make it live, you can select this option through your HUB. We'll attempt to publish your site, but we may call you if we need more info and to provide you with the next steps. **[PAUSE for response]**

**[If customer wants to review:]**

- If you have edits to make, or you want to discuss why our designers made certain choices, you can email those to me ahead of time, and we can walk through them together on the call.
- Ok, we're almost finished! I'll be sending you a recap email with all of this info in it, and here's what we accomplished today:

**Feel free to personalize the first two recap points, or read as follows:**

- We gathered business information and content for your website.
- We decided on all of your design details.
- We established our time frame and that we'll get to work on your website on **[date of send]**.
- Your website rough draft will take **number of business days based on build size**.
- And we scheduled our review call for **[date of review call]**.
- Total process start to finish is approximately 10 weeks depending on how quickly we make it through.
- Marketing Services is a subscription we offer to our customers for continued support moving forward for additional changes or content that is not covered in the initial scope of build. Lets check to see if you have it. If not, this will be something available to you in the future.
- Lets take a quick minute to tour your design hub where you will find all the information regarding your website build and where in the process you are.

## Website Design Hub Overview

**[Review the following]**

- How to log in to Website Design Hub; mention emails will include a link to their hub
- Show the customer where to upload assets - My Media link
- [U.S. ONLY] Show the customer the chat feature - lower right-hand corner while bubble labeled "Contact Us"
- Explain to customer that they'll view their draft in the hub and be able to leave comments with feedback

Let's do a quick walkthrough of your Website Design Hub. You'll use this hub to:

- Keep track of your website's progress.
- Upload all your photos and files.
- Schedule appointments as you need.
- Submit website edits without a call.
- Publish your website without a call.

We'll email you when it's time for you to review your website draft inside your hub.

Are you with me so far?

**[PAUSE for response]**

**If customer wants to create a new email linked to their domain, let them know you'll transfer them to that team now and that it should only take a few minutes to get that set up.**

- Any other questions for me before we wrap up? **[PAUSE for response]**
- Thank you so much for your time today, **[customer name]**! If you need anything from me, please don't hesitate to reach out --- everything you need will be in my email recap, so look out for that!

**1** If a customer has questions about the review call, let them know that it's optional, but we've found that the process is much smoother if we go ahead and get it on the books at the time of the consultation. Let them know that if they'd like to publish their site as-is and skip the review call or use it to publish and talk about final steps, they have that option, as well.

**1** Use the information you've already learned about the business to guide how you navigate these questions.

**1** You might skip questions where you've already learned the answer. Otherwise, use the prompts to collect remaining information about the business.

Plan Spec Sheet

Marketing Services One Sheet

Plugin Details

Worksheets Page

Available Modules

Google Fonts

WDS Stock Photos

WDS Stock Videos

External Stock Photos

External Stock Videos

Hero Aspect Ratio Tool

Performance Fact Sheet

Copywriting Process

**1** If customer wants to create a new email linked to their domain, let them know you'll transfer them to that team now and that it should only take a few minutes to get that set up.

Build Time Frames