New Initial Call Checklist

Pre call research

- [ ] Customer Name
- [ ] Business Name
- [ ] Industry + Purpose
- [ ] Location
- [ ] New build or rebuild?
- [ ] Existing online presence (site, social media, etc.)
- [ ] Current branding (logo, colors, fonts, etc.)
- [ ] Sales Notes

Greeting

- [ ] Greet the customer
- [ ] Set phone call time frame expectation
- [ ] **MUST READ:** State call recording disclaimer
- [ ] **MUST READ:** Validate account [Note: If the customer doesn't have their PIN, send them a text.]
- [ ] Share the purpose of the call and build rapport utilizing something you learned in the pre-call prep

Business Consultation

- [ ] Review if customer has an existing website and consult as needed
- [ ] Review business details
- [ ] Confirm customer product/service offerings on DCT and ask lead pass questions for GD payments

Website Design References

- [ ] Zoom share with customer unless it is causing friction
- [ ] Complete Business Personality Quiz unless cloning old site
- [ ] Discuss reference sites

Review Website Design

- [ ] Review Logo
- [ ] Review site elements

Review Content

- [ ] Understand the content they want to include on their site
- [ ] Recommend copywriting, stock image library, and image keywords as needed

Woo

- [ ] Understand and advise on functionality needs
- [ ] Review payment/shipping/tax settings

Go Over Time Frames

- [ ] Set build time frame expectation
- [ ] Explain overall time frame
- [ ] Review revisions process

Discuss Next Steps + Wrap Up

- [ ] Review Website Design Hub
- [ ] Schedule follow-up call and inform customer of standby list
- [ ] [Bundle only] Walk through photo shoot and social ads and connect to a platform specialist for platform connections
- [ ] Send follow-up email

Closing

- [ ] Ask if there are any questions or if the customer wants to review anything again
- [ ] Thank the customer for their time and for choosing GoDaddy

Record Account Notes

- [ ] Leave notes in Jira and CRM that include the phone number, who you spoke with, and any details that will set the next

DIFY Services Onboarding WOW Call Flow

Pillars

Initial Call Flow

Prep --> Open --> Discover --> Guide --> Close

Vibe

Breakdowns

High Level | Objectives + summary

How | Behavioral attributes that make an effective call

What | What to tactically include on the call

Prep

High Level

Objective: Gain understanding of the customer, industry, and their online presence. Perform effective pre-call prep [5-min dig-in: Use five minutes and the cheat sheet to learn more about the customer.].

How

Be prepared to thoughtfully and expertly fill out the DCT with the customer. Take some time to understand the industry, location, branding assets, their website assets, current website situation, social media status, and any relevant information about the customer before the call.

What

Do your 5-min dig-in.

- Customer Name
- Business Name
- Industry + Purpose
- Location
- New build or rebuild?
- Existing online presence (site, social media, etc.)
- Current branding (logo, colors, fonts, etc.)
- Sales Notes

Open

High Level

Objective: Establish customer confidence in the process and illustrate professional control of the entire journey.

1. Intro and connect around customer's business.
2. Set stage for purpose of call.

How

Intro and connect around customer's business

- Start the call with a positive, friendly attitude, and engage with the customer on a personal level.
- Match or exceed the customer's excitement about building their site. Maintain the friendly attitude and enthusiasm through the entire call.

Set the stage for purpose of call

- Ensure the customer understands the purpose and overall goal of the call.
- Engage the customer with findings from your 5-min dig-in.

What

Greet Customer

- Greet the customer
- Share the purpose of the call and build rapport utilizing something you learned in the pre-call prep
- Set phone call time frame expectation
- **MUST READ:** State call recording disclaimer
- **MUST READ:** Validate account [Note: If the customer doesn't have their PIN, send them a text.]

Discover

High Level

Objective: Gain comprehensive understanding of customer's business needs, technical proficiency, and website goals to inform tailored solutions effectively

1. Use pre-call research to segue and come from an informed position
2. Get a sense for persona of customer - assess technical know-how, participation preferences, etc.
3. Clearly understand customer goal(s) with the site

How

Actively Listen

- Actively listen to customers, picking up on clues and interpreting their needs even when not directly stated.
- Tailor communication to the individual customer's personality, role, and context.

Understand the Customer's Needs

- Be adaptable to different situations and understand the customer's goals and needs clearly.
- Understand the customer's business needs and align on the purpose of the website.
- Understand how the customer wants their business to be represented to ensure consistency with branding elements.

What

Business Consultation

- Review if customer has an existing website and consult as needed
- Review business details
- Confirm customer product/service offerings on DCT and ask lead pass questions for GD payments

Discuss Design References

- Zoom share with customer unless it is causing friction
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- Discuss reference sites

Guide

High Level

Objective: Provide expert guidance, recommendations, and vision-capture to align customer preferences with website objectives seamlessly.

1. Steer and guide based on needs and expert knowledge.
2. Correct and make recommendations.
3. Capture vision and preferences.

How

Organize and Control the Call

- Stay organized during the call, ensure important topics are covered, and maintain call control. Maximize the discussion around key design and functionality aspects.

Capture the Vision

- Ensure that every detail of the customer's website expectations is thoroughly recorded. If the conversation is had, the customer will assume it was understood and will be represented in the site build.
- Clear and accurate notes are crucial for the Builder's to bring the vision of the customer to life, and significantly reduce the risk of misunderstandings throughout the site development process.

Be the Expert

- Once you understand the customer, their industry, ideas, and goals add creativity to suggestions while asserting expertise.
- Have real opinions and preferences to effectively make recommendations and reflect their personal style.
- Help customers gather content during the call to streamline the process and avoid frustration with content submission later.

What

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Review Content

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Close

High Level

Objective: Confirm customer understanding of next steps, express gratitude, and foster enthusiasm for the journey ahead in website development.

1. Clarify what to expect next.
2. Share thanks and excitement for the customer.

How

Set Expectations

- Clearly communicate what will happen next and provide all relevant timelines or deadlines.

Confirm Understanding

- Ask the customer if they have any questions or if there's anything else they would like to discuss before concluding the call.

Express Gratitude

- Thank the customer for their time and for choosing our services.

What

Go Over Time Frames

- Set build time frame expectation
- Explain overall time frame
- Review revisions process

Discuss Next Steps + Wrap Up

- Review Website Design Hub
- Schedule follow-up call and inform customer of standby list.
  - "What days and times work best for you? Awesome! One of our guides will reach out sooner if available. Otherwise, we look forward to helping you on our next scheduled call!"
  - "We have you all set and scheduled for (BLANK DATE/TIME). If your site is ready earlier, we will call you sooner!"
  - *Note: Should the client request to NOT be called sooner than the scheduled appointment, we can remove them from the standby list.*
- [Bundle Only] Walk through photo shoot and social ads and connect to a platform specialist for platform connections.
  - Photo Shoot: 1. Review photoshoot expectations. 2. Collect customer availability/schedule. Collect photo details for photographer.
  - Social Ad: 1. Discuss social ad. 2. Set expectation for when they will receive ad and how long they have to approve.
  - Platform Connections: 1. Connect customer with Platform Specialist at x59357. 2. Invite Platform Specialist to join and take over Zoom call. 3. If the customer isn't ready, schedule a follow-up call using the Platform Operations Calendly link.
- Send follow-up email

Closing

- Ask if there are any questions or if the customer wants to review anything again
- Thank the customer for their time and for choosing GoDaddy

Record Account Notes

- Leave notes in Jira and CRM that include the phone number, who you spoke with, and any details that will set the next guide up for success.
  - Customer's name that you spoke with:
  - Phone Number:
  - Domain:
  - Customer temperament (Green, Yellow, Red) *If Red or Yellow please state the why.*
  - Missing Items:
  - Next steps:
  - Helpful information for next guide/next steps:

Vibe

High Level

Objective: Provide enthusiastic, next-level customer service.

How + What

All behaviors should be present throughout the call.

Maintain an enthusiastic and appropriate tone and level of engagement.

- Aim for delivery that's highly engaging with natural conversational flow and appropriate humor or warmth. Mirror the customer's excitement or bring the customer's energy to a higher level.

Build rapport.

- Demonstrate genuine interest and enthusiasm in understanding the customer's business, goals, and preferences.
- Tailor questions and responses that address the customer's specific circumstances and concerns.

Organize and control the call.

- Guide the call smoothly, maintaining structure while allowing for customer engagement.
- Keep the conversation on track, redirecting tangents promptly to stay productive.

Resources

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

Revisions Expectations

Plan Spec Sheet

Marketing Services One Sheeter

Performance Fact Sheet