New Review Call Checklist

Do your 5-min dig-in

Review / Publish

- [ ] Revision Round #
- [ ] PRIORITY 1: Customer feedback [Atarim + Jira] + recent communication
- [ ] PRIORITY 2: Review DCT against site draft
- [ ] PRIORITY 3: Assess which assets are needed or have been recently uploaded
- [ ] Customer Name
- [ ] Business Name
- [ ] Industry + Purpose
- [ ] Location

Leapfrog

- [ ] PRIORITY 1: Review DCT against site draft
- [ ] Customer Name
- [ ] Business Name
- [ ] Industry + Purpose
- [ ] Location
- [ ] Current branding (logo, colors, fonts, etc.)

Greet customer and set stage for the call

- [ ] Greet the customer
- [ ] **MUST READ:** State call recording disclaimer
- [ ] **MUST READ:** Validate account [Note: If the customer doesn't have their PIN, send them a text.]

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- [ ] Tell the customer about survey.
- [ ] Thank the customer for their time and for choosing GoDaddy.

Record Account Notes

DIFY Services Review Call Flow

Pillars

Review 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's feedback and the state of the site. Perform effective pre-call prep [5-min dig-in: Use five minutes and the cheat sheet to learn more about the customer.].

How

Take some time to understand the customer's feedback, website draft, and any relevant information about the customer before the call. Be prepared to thoughtfully and expertly notate revisions with the customer.

What

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Open

High Level

Objective: Establish customer confidence in getting from this point to a published site and illustrate professional control of the entire journey.

- Intro and connect around customer's business.
- 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.
- Engage customer with enthusiasm and remind them of the collaborative effort.
- Convert any concern to an opportunity to make the site better.

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 and set stage for the call

- Greet the customer

- 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
- Set phone call time frame expectation

Discover

High Level

Objective: Gain understanding of customer's reaction to site draft, preferences, and website goals to inform tailored solutions effectively

- Use pre-call prep to segue and come from an informed position
- Get a sense for persona of customer - assess technical know-how, participation preferences, etc.
- Clearly understand customer preferences for revisions with the goal of getting the site to a published state soon

How

Actively listen

- Tailor communication to the individual customer's personality, context, and feelings about their site draft. De-escalate as necessary.
- Set realistic expectations while emphasizing the collaborative nature of the project and acknowledging initial content as placeholders if needed.

Understand the customer's needs

- Understand the customer's goals and align on the revisions.

What

Set up the Zoom and set the tone for the call

- Zoom share with customer unless it is causing friction.
- Understand if the customer has seen the site. If not, explain that they will be going over it today on the call.
- Gauge customer's initial reactions to the site and assure collaboration to align the site with their vision. De-escalate customer as needed.

Guide

High Level

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

- Steer and guide toward publishing based on needs and expert knowledge.
- Correct and make recommendations.
- Capture vision and preferences.

How

Organize and control the call

- Stay organized during the call, ensure clarity of revisions, and maintain call control. Maximize the discussion around what is needed to get the site published.

Capture the vision

- Acknowledge any feedback or edits already provided by customer and revise together for more clarity if needed.
- Ensure that every detail of the customer's revision expectations is thoroughly recorded.

Be the expert

- Focus on using your expertise to get the customer across the finish line to a published site.
- Help customers gather content during the call if applicable and stay informed on platform capabilities and project scope.
- If it's the first review call or the design on a subsequent call is still not what the customer wants, make effective recommendations based on customer, industry, ideas, and goals.

What

Confirm for publish OR notate and/or make the revisions gathering content, files, forms, and info as needed

- Go page by page in order, writing clear notes for changes OR making on-the-fly changes. Go through the customer's notes on Atarim if applicable.
- Redirect and correct customer if they request something out of scope.
- Obtain content from customer as needed, but if the customer is unprepared, take notes and follow up later. - Fill out functionality forms for relevant plugins and changes.
- [Woo only] Review payment/shipping/tax settings

If past round 1 of revisions ...

- Understand the fundamental reason behind why more revisions are needed
  - Is placeholder content being replaced?
  - Was something done wrong?
  - Did we make adjustments on the first revision that we aren't in love with?

If logo is bundled ...

- Complete logo design consultation. Reference this resource as needed.
- Schedule a follow-up call to review their logo design.

Guidance for writing revisions

- Use simple, straight forward instructions including all necessary details such as text, images, links, and screenshots.
- Reference exact file names and ensure all relevant files are attached and easily identifiable.

Close

High Level

Objective: Confirm customer understanding of next steps, express gratitude, and foster enthusiasm for getting their site published.

- Clarify what to expect next.
- Share thanks and express 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

Discuss next steps + wrap up

If revisions are needed ...

- Set revisions time frame expectation.

If publishing ...

- Test contact form and inform customer of 72-hour propagation.

[For happy customer]

- Lead Pass Motion: *"Your website is now live. The next step would be to schedule a consultation with one of our marketing experts to discuss the various marketing packages we offer. Would you like to schedule a call?"*

Closing

- Ask if there are any questions or if the customer wants to review anything again.
- Tell customer about survey.
- 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.

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.