Starter WP Initial Call Checklist

Greeting Jump To Section
- Introduce yourself and the department
- Sets expectations for call time frame
- **MUST READ:** State call recording disclaimer
- **MUST READ:** Validate account
- Welcome customer to the team
- Set agenda for the call
- Set overall time frame from initial call to publish
- **Set expectation for Post Publish Support**

Plan Breakdown Jump To Section
- Provide a breakdown of the customer's plan level
- Frame the build positively
- Identify and speak to mosquitfeed builds

Business Consultation Jump To Section
- Start Zoom share with customer for DCT
- Collect or verify the customer's Business Contact Information on the Basics tab.

Existing Website Jump To Section
- Review if customer has an existing website

Reference Websites Jump To Section
- Review reference websites
  - If no reference websites, review similar industry sites in WDS Gallery

Branding Jump To Section
- Determine if the customer has existing branding

Logo Jump To Section
- Determine if the customer has a logo

Color Jump To Section
- Recommend color scheme: dark theme, light theme or designers discretion

Starter Site 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 35 minutes.
- 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 validate into your account. Do you have your **4 digit PIN**? [PAUSE for response]

- I want to thank you for working with us! I'll be your main point of contact throughout the process. [PAUSE for response]

[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?

- Today, our call has 3 basic sections. First we'll talk about your business, then your design options, 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]
- Before we get started let's review the time-frames and the process for your website.

- We will have a total of three calls during the process.
  - Initial website design consultation (That's this call)
  - Initial Draft Review for any changes you may have for the initial draft, and
  - A Publish call where we get your website live!

- Our designers use the information you provide today about your business, target audience, and branding to create a unique website that captures your vision and your business personality and will be ready for you to review in 7 business days.
  - We'll send you an email to preview the initial draft.
  - That email also includes a link to let us know how we did.
  - There's also a document you can download to organize edits before we meet again.

[PAUSE for response]

- On our next call we will review any changes you have for your site, then our website designers will take care of these revisions. Occasionally our first draft doesn't quite capture your business personality, and that's why our revisions review is so important. We'll send you a new preview link for you to review before our final call. The revisions to publish process should take less than two weeks.
- One of the most exciting parts of the process is going live! Once your website is published you and I will wrap up our work together. For any last-minute minor changes we can submit a ticket together and our team of specialists will follow up with you to assist. You can also give us a call if you have any questions and one of our site specialists will be there to help you out.

- The total time-frame from this consultation to publishing your site live is about six weeks from start to finish.

- I know that is a lot of information! Any questions before we move forward? [PAUSE for response]

> *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.*

Plan Breakdown

Select customer's plan type below for breakdown:

Plan Spec Sheet

STARTER PLAN BREAKDOWN

If a customer has questions about updates to their website, let them know that once their site is published, they have access to our training hub to do it themselves.

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.

Go through steps to connect to Zoom. Screenshare customer responses in DCT (modal).

[Add customer's First Name,Last Name,Email under About You section on the Basics tab]

- Let's go through information about you and your business.

INFORMATION PROVIDED BY CUSTOMER DURING DIGITAL ONBOARDING

Update Basics Tab information if needed during the review.

- What domain name are you using for your new website?

[Add Domain Name under About Your Company]

- Next we will be reviewing more information about your business.
- What specific services does your company provide?

The answers to this question can help you understand what design elements and keywords to focus on.

- What sets your company apart from your competition?

The customer's response will help the copywriting create unique content for the site.

- Who is your target client?

Ask probing questions to help the customer describe their ideal clients, including things like age, location, gender, education, occupations, etc. Understanding the customer's target audience will give us direction for design elements — such as colors, images and fonts — to use on their website.

- I see here the goal of your site is to [generate leads, showcase your work, provide information, sell a product or service, other]
- Based on your goals, here are some options we can add to your website that can help achieve your goals.

Generate Leads

Showcase Your Work

Provide Information

Sell a Product or Service

Other

- What keywords do you think a visitor would use to find your website?

The answer to this question will show what keywords the customer would like included in any copywriting, and will help with Search Engine Optimization of the site once it goes live.

> *Use the information you've already learned about the business to guide how you navigate these questions.*
>
> *You might skip questions where you've already learned the answer. Otherwise, use the prompts to collect remaining information about the business.*

Design Consultation: Branding

Plugin Details

Worksheets Page

Available Modules

Existing Website

If the customer has an existing website

If the customer DOES NOT have an existing website continue to Website Features question

- What features will your website need?

Forms, Maps, Social media buttons, Click-to-call buttons, Pricing tables, Calls-to-action, ...etc.

Reference Websites

If the customer provided reference websites

If the customer DID NOT provide reference websites

- Next we're going to talk about your design options.

Branding

- Does your company have established branding?

Branding includes materials that the website will need to match, including colors, fonts, business cards, newsletters, flyers, logos, signs, etc. If the customer doesn't have an established brand, we will use the information on colors and fonts to help with the design.

IF YES, customer has established branding

IF NO, MOVE TO THE LOGO SECTION

Logo

Has the customer purchased a logo?

IF YES, customer has purchase a logo design service

If the customer has not purchased a logo design?

- Do you have a logo that you'd like to use? [PAUSE for response]

IF YES, customer has a logo

IF NO, customer does not have a logo

> *If customer mentions custom logo design, let them know you can get them set up for that at the end of the call, and then follow motion for selling logo.*
>
> *Tip: If a customer needs to send in their logo, we shouldn't let that hold up their site build. Let them know we can make those simple edits during revisions.*

Website Colors

If customer has chosen or provided a logo, branding, or inspiration site whose color scheme they like

If no clear color preference has been provided so far:

If customer has specific color preferences

> *If customer has strong color preferences,If you're pulling colors from the logo, this section may not be relevant.*
>
> *Complementing the site with the logo colors or branding is ideal; this helps the site be branded to the customers' business colors However, if there is no logo, or the customer is having a new logo created, simply saying, "what colors do you like" is NOT discussing the colors correctly.*

Design Consultation: Fonts

Google Fonts

If customer has provided a logo, branding, or inspiration site(s)

If customer has not provided a logo or branding materials

If customer has specific font request

Design Consultation: Site Elements

WDS Stock Photos

WDS Stock Videos

External Stock Photos

External Stock Videos

Hero Aspect Ratio Tool

Performance Fact Sheet

- Now, we're going to talk about the elements to include in your design. Most of the site elements will be based on the content you provide. We want to make sure we create a home page experience that represents your business and your website goals. [PAUSE for response]

About Homepage

- First up, let's talk about your website's homepage. It's the first impression that your visitors will have of your website, and it's also where they'll find most of the information about you. We recommend keeping this page simple and clean to navigate. [PAUSE for response]
- So, let's tackle which elements you'd like to put on the homepage. We'll include your logo/business name and your navigation by default.
- The builder will design your header's layout to best suit the shape of your logo, the number of pages in your menu and the header elements you've selected, while keeping your business goals and website design performance in mind. Any questions so far? [PAUSE for response]

[Recommend one or more of the following options based on your understanding of the customer's needs]

- I'd recommend adding [your phone number/ your social media links/ a call to action button encouraging your customers to _____/ a search bar so your customers can quickly find the product they're looking for].

[PAUSE for response]

Hero Image

- Great, next is our hero image. This will be the main image on your homepage for desktop and mobile devices, so we'll want to make sure we choose something that represents you well. Do you have an image in mind? Or would you like for us to choose an image from our stock photo library for you?

If a customer has a photo the want to use

If a customer wants to use stock images

If the customer wants to use a video on the homepage

Footer

- Ok, so moving down the page, the final choice we need to make is what goes into the footer. Typically what we do here is repeat some of the contact info from the header, and add a few more informational elements. These can be links to other pages, your hours, any icons you'd like to use, like logos of products you work with, or awards you've won, or associations you belong to — things like that.

[Make a recommendation based on the customer's needs. For example:]

- Do you have any specific requests for the website footer? [PAUSE for response]

Logo Consultation: Customer Purchased Logo Design Service

Logo Consultation

Gathering Content

Copywriting Process

- Ok, we're making good progress, [customer name]. I've got lots of good info about your business, and we've nailed down all of our design choices.
- The only remaining piece is gathering your content for your site. Before we discuss the verbiage, let's review your starter site elements.

[PAUSE for discussion]

- Ok, great, now let's talk about the content on those pages. ***Pick the "if" scenario below that best fits.***

If customer doesn't have an existing site or copy to reference or send in

If customer already has a website with existing content

If customer has drafted an email to send existing assets

If customer indicates that they will send in content now

> *All builds will go to a Copywriter, whether for new copy or for polishing / proofreading.*
>
> *Pick the "if" scenario that best fits the customer's situation. You'll read one of the paragraphs, not all of them!*
>
> *Think about whether the customer will need to send content and assets within the next 7 days or if we can send to build today.*

[If customer has copy/assets, but needs to find them and send them in]

- What we can do is go through some questions now that'll help our content writers get started on your website content today, and as soon as you're able to send us your copy, we'll use that to polish it up. How does that sound?

Walk customer through copywriting questions in the design tool.

[If customer insists on holding off until they can send in their copy:]

- If you're not able to get them to me before [today + 1 week], I'll send what we've collected today to your website designer, and they'll use their expertise to create your site. We can then spend our next call

Do's and Don'ts

- ***Review Do's and Don'ts questions with customer.***
- ***Use the template to add the answers to the Basics Tab in "Additional Business Details (For internal use only)"***

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Do Dicks:
Do Not Do This:
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- Before we wrap up is there anything you specifically want us to include on your site that we have not covered?

Notate the answer(s) in the DO THIS section:

- Is there anything you want us to NOT include on your site?

Notate the answer(s) in the DO NOT DO THIS section:

Examples:
DO THIS: N/A
DO NOT DO THIS: No sprinkles!

DO THIS: For the buttons on the website the customer wants them to be transparent with a black hover effect
DO NOT DO THIS: They do not offer grass-fed beef

DO THIS: N/A
DO NOT DO THIS: N/A

Next Steps + Wrap Up

- 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 our team 7 business days to get your website ready for you to 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"

- Great, and we'll email your website to you to review before that call. If you're ready to make it live, reply to that email, and we can publish your site and send you an email 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:

1. We gathered business information and content for your website.
2. We decided on all of your design details.
3. We established our time frame and that we'll get to work on your website on [date of send].
4. And we scheduled our review call for [date of review call].

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!

> *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.*
>
> *Think about whether the customer will need to send content and assets within the next 7 days or if we can send to build today.*

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