

Onboarding process

- Client is determined to be a warm lead (reached out to us, or we identified directly from a show / interaction)
- Add them to Close
- Status: Qualified not in trial yet
- Ask if they'd like a demo
- Ask for content if they don't have a current site (see Close email template for Demo site content)
- Schedule online demo for an hour
- Build demo site (wizard and then anything you can do with meetings and transparency, create nice landing pages and home page with teasers if possible)
- Do demo
- Show pricing (getstreamline.com/web#pricing)
- If they want to log in and play with it, invite them to the free trial period (typically 14 days but if they need longer, ok - **just get a date if possible** so we know when to check in again)
- Send them the welcome to streamline Close.io template email
 - Fill in their URL at the top
 - Fill in their password or add Firstname2018
 - Add their monthly fee and start date to the bottom, as well as membership status
- If you were able to get a start date for invoicing, send Ginger and email and cc team@getstreamline.com

Subject: SL invoicing

Content:

Acme Municipal Utility District
PO box 123
Acmeville CA 90000

CSDA member
Monthly operating revenue: \$250-500k
Monthly invoice amount: \$75
Invoice start date: March 1, 2018

Joe Blow
(916) 900-6619
joeblow@acmemud.org

Content to ask for to build a demo site

(All would be good, but everything is optional)

Logo or seal

Contact information (name of District, address, phone, email)

Mission statement

Services statement or overview of services

Meeting info / schedule (third Wed of each month at district office, for example)

A few recent agendas or minutes if available

Board overview (5 member board elected to four year terms, for example)

Board members - names/titles at a minimum. Bio, photo, contact information is awesome!

Staff intro (committed to the client etc)

Staff members - names, titles at minimum, Bio, photo, contact info

General content (something to make the home page look good):

- Public notices, a few

- Newsletters, a few

- Or Announcements, a few

Great images, if you have any (can be large files)