CLIENT ONBOARDING CHECKLIST

LIST BUILDING LIFESTYLE

Before The Order

- [ ] Ask the client what offer would he or she would like to send the traffic to.
- [ ] Examine the offer to ensure it's a good fit. Most of the time, it will be. On the rare instance the funnel or offer doesn't make sense (here are a few examples; 1, 2, 3, 4), it's best to be honest about it and recommend a different offer. Prospects appreciate honesty (especially the beginners among them).
- [ ] If there is a time constraint on the delivery (on a platform like Udimi, for example) - confirm the exact link to send traffic to (especially if there was more than one link mentioned during conversation). If there is no time constraint, you can do it after the order is placed.
- [ ] Agree on the specific number of visitors the client would like to buy.
- [ ] Address any special requests the client expressed and whether you're able to fulfill them (for example, a client may ask to deliver all traffic by the deadline of an affiliate contest they're involved in).
- [ ] Align expectations. If it is evident that the client's expectations are unrealistic ("I want to make $1,000,000 from this 50 click campaign"), it's important to set things straight before accepting the order.
- [ ] Set up a payment link and send it to the client.
- [ ] Follow up with the client even if they don't immediately act on the offer. People tend to get busy or forget.

After The Order

- [ ] If you haven't confirmed the target link you'll send traffic to before the client placed their order, do so now. Ask the client to test their link and back-office set up before the campaign runs.
- [ ] If you guarantee a specific opt-in rate with your client's order, ask the client whether there are any opt-in restrictions on their page before you run the campaign (double opt-in, Gmail addresses only, etc). Since those restrictions are likely to reduce the final opt-in rate, it's important he or she understands it and doesn't expect you to reach the guarantee. Another option is increasing your pricing, so you can send more traffic and safely deliver the guarantee.
- [ ] Test the page yourself. Opt into the client's page and ensure you're redirected to the next page safely, without a visible error on the other page (like 404 page not found, for example).
- [ ] Cloak the client's link with Click Magic, to protect them (and yourself) from bad traffic.
- [ ] Summarize and agree on all the details with the seller (what link to promote, what is the public Click Magic report so the seller can watch the traffic you're receiving live, any deadlines or special terms involved from the client, etc). If you're running the order on Udimi, make the seller aware of it.
- [ ] Confirm the traffic delivery start date and target link with the client so he or she isn't kept in the dark.
- [ ] Once the campaign is delivered, notify the client and share the public report, asking them how it went. If the client doesn't answer the first attempt, keep following with him or her.

SUPPORT@LISTBUILDINGLIFESTYLE.COM

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- [ ] If the client saw good results - send them the testimonial getting script
- [ ] If the client saw bad results (but you protected yourself with tracking and you know the traffic is solid) - ask more questions about their set up to help them diagnose the source of the problem. You will usually find out that the client doesn't follow up with their customers, doesn't sell offers higher than $10, etc