

Kallzu Live Bootcamp

6 Weeks, 12 Sessions

And 5 Clients Guaranteed!



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Session 6: Customer Onboarding & Support

What We're Covering Today



- Mindset Reminder
- Customer Support
- Customer Onboarding
- Combining & Splitting Support & Onboarding
- Q & A

Mindset Preparation

Important Notes:

- Follow the training and do what we ask you to do here in the bootcamp.
- The faster you get it done, the more momentum you'll build.
- More momentum = faster results
- Get creative later, when you have the financial resources, the staff and the experience to try new things

Important Notes:

- This is a set of systems to help you build your OWN franchise model
- With this, you'll be able to scale your agency to as large as you want
- You can screw this up 6 ways from Sunday and still be successful
- Let's not do that. You'll be more successful than you "could have been" if we stick to what works first!

Important Notes:

- Every time you break away from what you need to do here, you kill your momentum.
- What happens when your momentum is at zero again?
 - You lose motivation to continue growing
 - You may see results, but not the results you really want
 - You'll have to "re launch the rocket"

Important Notes:

- 5 Clients is a minimum here
- Your target KPI for these systems is to first hit 1 client per day, 5 days per week
- 2nd KPI is to go to 2 clients per day, 5 days per week
- You do not have to implement all of these systems at once (not recommended)
- Work your way through each system. Set KPI tracking, company training and then move forward

Important Notes:

- Your business is a mirror. It reflects from who you are.
- A great mentor of mine told me once: If you want to grow your business, grow yourself!
- Examples of the “mirror effect”
- How do you grow yourself the “right way”?

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- Combining & Splitting Support & Onboarding
 - Overview
 - Job Postings
 - Interviews
 - Setup For Customer Support & Onboarding
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- Customer Onboarding
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Customer Support & Onboarding Combined

Overview

Job Postings

Interviews

Setup For Customer Support & Onboarding

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- Customer Support



- Customer Onboarding

- Q & A

Important Notes:

- Add to your company training site
- Secure it, make it private access to only your staff
- Add onboarding training
- Add support training
- Start tracking KPIs for both
- Split the two positions when you need to
 - Hint: base this on workload

Company Training For Onboarding:

- Training on how to make the calls they need to make every day/week to new clients.
- Process of adding new clients to Client Engagement Sequence, Live screen share over a call to show the back office login and how to use it.
- How to setup a kallzu 2.0 account
- Weekly conversations (minimum):
 - Call targeting
 - Volume & capacity to take more calls
 - Sales training
 - Competition calls
 - Price shoppers

Company Training For Support:

- How to report # of dials every week
- How to make the calls to existing clients

KPIs For Onboarding:

- This is checklist style for each client. Did they do “X”?
Yes/No.
- Use a Google Sheet to keep track of this, much easier to manage.
- Hint: color codes help

KPIs For Support:

- # of dials every day and every week
- Dates calls were made
 - Hint: Use timestamps on a Google Sheet
- # of Reups (client fund reloads into accounts)
 - Track amounts that were funded too!
- Reports go to manager position

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Q & A

