

1. Login to Upwork and post your job ad (copy/paste) from the job posting for Customer Onboarding. Use the screen shots for upwork posted below to use the right settings:

Edit a Job

Category
Sales & Marketing -> Lead Generation

Describe the Job

Name your job posting
Phone Prospecting - Lead Generation

Describe the work to be done 3553 characters left

Our company is looking for someone to do phone prospecting for us.

I'm looking for 8 hours of work per day Monday - Friday to start with potential to advance in position. If you are looking for consistent work from week to week then this is a great position for you.

Position will require you to generate leads (phone numbers) using our software. The rest of the day will be spent using a predictive dialer for establishing interest in our service. These calls will be placed to business owners during business hours (US).

Instead of the job title you see posted, use this title instead

CUSTOMER ONBOARDING SUPPORT NEEDED - FULL TIME

drag or upload project files

You may attach up to 5 files under 100 Mb.

What type of project do you have?

One-time project

Ongoing project

I am not sure

How many freelancers do you need to hire for this job?

I want to hire one freelancer

I need to hire more than one freelancer

freelancers

Enter skills needed (optional)

Put in 3 freelancers to hire

Rate and Availability

Desired Experience Level [?](#)

\$	\$ \$	\$ \$ \$
Entry Level < \$6.50 /hr	Intermediate \$6.50 - \$22.00 /hr	Expert > \$22.00 /hr

How long do you expect this job to last?


6+	3-6	1-3
More than 6 months	3 to 6 months	1 to 3 months	Less than 1 month	Less than 1 week

What time commitment is required for this job?

What time commitment is required for this job?

 More than 30 hrs/week	 Less than 30 hrs/week	 I don't know yet
------------------------------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------------------

Freelancer Preferences

 Do you want freelancers to find and apply to your job?

- Freelancers using Upwork.com and public search engines can find this job.
- Only Upwork users can find this job.
- Only freelancers I have invited can find this job.



 Preferred Qualifications


Specify the qualifications you're looking for in a successful application. Freelancers may still apply if they do not meet your preferences, but they will be clearly notified that they are at a disadvantage.

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[Hide Qualifications](#)

Freelancer Type	<input type="text" value="Independent - work with your freelancer directly"/>
Job Success Score 	<input type="text" value="Any Job Success"/>
Rising Talent 	<input type="text" value="Don't include Rising Talent"/>
Hours Billed on Upwork	<input type="text" value="Any amount"/>
Location	<input type="text" value="Any location"/>
English Level (self-assigned)	<input type="text" value="Native or Bilingual - Knowledge of idioms and colloqu..."/>
Group	<input type="text" value="No preference"/>


 Screening Questions

Add a few questions you'd like your candidates to answer when applying to your job.

[Add Another Question](#) 

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 Cover Letter

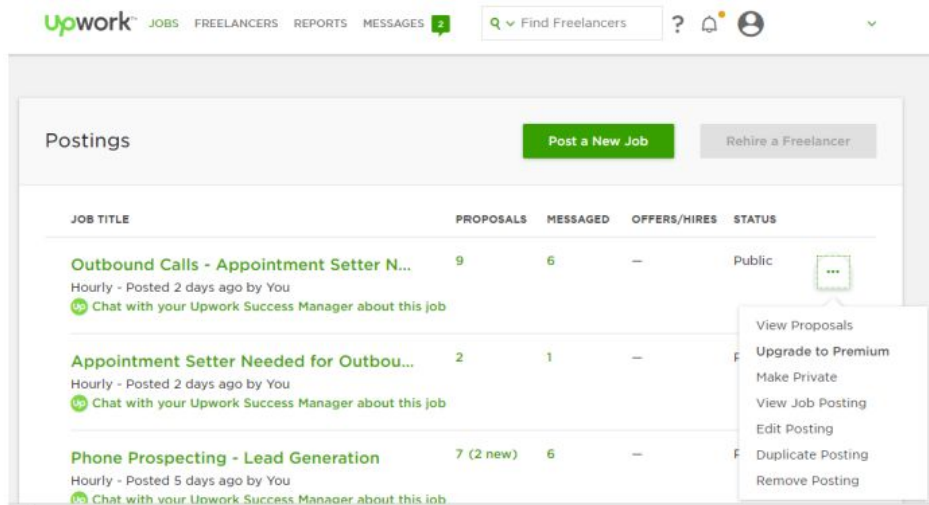
Ask applicants to write a cover letter introducing themselves.

Yes, require a cover letter

 Boost your job's visibility

Tell me how I can reach more freelancers and hire in less time.

[Save Job](#) [Preview](#)



2. Post a couple (2-3) job postings (use duplicate post) as shown above. Wait 24-48 hours as your applicants come in.

3. Interview your applicants using the interview guide.

4. Review the first onboarding process tests.

5. Hire your customer onboarding support position

6. Set the new hire up with Kallzu 2.0 software access, autoresponder access for CES (Client Engagement Sequence) and your company training detailing how you want the onboarding process to go. Hint: follow the Client Engagement Sequence

K.P.I.'s for Customer Onboarding Support (it may take a bit to build up to these stats, but this is what you're looking for):

-Use a checklist style via Google Sheets:

of dials made (daily and weekly)

Date (time stamp) when each call was made

What was covered on the call with client

of reups (weekly) and amounts on each reup for a client, new or existing