

HOW TO

# ONBOARD NEW CLIENTS

The Ultimate Guide to Getting Your New Clients Great Results Fast



A Publication of  
HubSpot's Partner Program



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INTRODUCTION

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# THE AGENCY AS A CHANGE AGENT

## NEW SHERIFF IN TOWN / INTRODUCTION

Crumpled up cold-call lists bounce across your client's office like tumbleweeds. Lead flow in their CRM is barren like a dried up lake in Death Valley. Ask a sales representative about a marketing qualified lead, and they'll say something akin to "we don't get much of their kind 'round these parts anymore."



But there you stand - among the vulture-picked cardboard skeletons of Yellow Pages and newspaper ads, the new Sheriff in Town – the inbound agency hired to save their business from drought, famine and cattle-rustlers.

Inbound Marketing will represent a seismic shift in your client's marketing. Make sure you help them see the value in it's adoption as fast as possible.

As a change agent, your agency needs to manage time and resources effectively and efficiently from the beginning. Be an authoritative voice. Be the one directing the action. But most of all, be the driver behind an on-boarding process that both educates the client team and produces measurable results. By the end of your first three months working together, your client team should be well-trained, highly motivated looking to the future for more inbound opportunities.

*Let's dig into why onboarding is important...*



## WHAT IS ONBOARDING? / INTRO



*“Beginning a client engagement with clear action, as to spur faster results and establish agency leadership & credibility”*

## 3 REASONS YOU NEED A PROCESS / INTRO

1

### **Capitalize on Momentum...Faster**

The goals of the sales process are fresh in your client’s head. Agencies with a defined onboarding process, boiled down to tasks and timelines, help their clients hit the ground running.

2

### **Show Real ROI...Faster**

Agencies with an onboarding process focused on the most critical elements of inbound marketing position themselves to have an immediate impact on traffic, leads and customers.

3

### **Increase your Retainer...Faster**

Agencies that put inbound marketing mechanisms in motion quickly get results fast. This allows them to start sentences with “because” instead of “when.” Recommendations for larger project scope are best received when taken in the context of successes.

# CHAPTER 1

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5 RESOURCE QUESTIONS  
YOU NEED ANSWERED BY  
THE END OF THIS EBOOK



## GET ANSWERS FAST / RESOURCE QUESTIONS

The first conversation after your closing call has to be all about action. The voice on the other end of the phone is no longer a prospect; they are a client. Your team needs to understand what resources will be available during the engagement and get moving as fast as possible. Below are the mission critical questions you need to have answered during that first client conversation:

1

WHO IS YOUR AGENCY'S **TECHNICAL RESOURCE** AT THE CLIENT?

2

WHO ON THEIR TEAM WILL BE HELPING TO **CREATE CONTENT**?

3

WHO ON THE **SALES TEAM** WILL BE WORKING THE INBOUND LEADS?

4

WHAT IS THE PLAN FOR **DOCUMENT AND RESOURCE MANAGEMENT**?

5

WHAT WORKS BEST FOR **CHECK-IN CALLS**? RECURRING MEETINGS?

*Let's dig into them one by one...* 





## TECHNICAL RESOURCE / RESOURCE QUESTIONS

There is nothing sexier than setup. That is an undeniable fact. All of the awesome campaigns you're going to run for your clients, the growth you'll enable, will be all for not unless you are technically setup. Proper set up ensures that leads get handled correctly, Google sees your content and, most importantly, that the results are measureable and attributable back to your agency. Do not move forward until you dot these "i's" and cross these "t's."



### Technical Contact Call Checklist <img alt="arrow pointing left" data-bbox="715 555 860 595"/>

Find out who your technical contact is as soon as possible. When you know who this person is, book a time on his or her calendar. Buy them lunch. Do whatever it takes to make sure they help you accomplish the below:

- How Do We Install Javascript on the Website Pages?
- How Do We Setup A Subdomain for Landing Pages & Blog?
- How Do We Connect Social Media Accounts to SM Software?
- How Do Integrate Client CRM for Closed-Loop?
- How Do We Make Necessary On-Page SEO Changes?

## CONTENT CREATION / RESOURCE QUESTIONS



The more hands you have on deck for creating content, the more content gets produced. The more content gets produced, the more pages get indexed by search engines. The more pages that get indexed by search engines, the more keyword searches you're client will rank for. You probably get where we're going with this. Bring as many people into your initial blog training as possible, and make sure that training happens fast. Have people leave that meeting anxiously awaiting an editorial calendar.



### Content Creation Call Checklist

- Who on your marketing team will be creating content?
- Who from other areas of the business can contribute?
- How frequently will folks on this team be able to write?
- How much can we allocate for outsourcing content creation?
- To make sure people are set up for success, when is a good time to schedule some training on blogging?

## INBOUND SALES REPS / RESOURCE QUESTIONS

Inbound leads are gold. They cost less than outbound leads, and they are proven to convert at higher rates. But that's only if the folks on your clients sales team understand the content that produced them and follow-up in a timely manner. If you get the content machine fired up straight away, then leads won't be far off. Make sure the team tasked with turning them into customers is plugged into your strategy and make sure they're positioned to succeed.



### Sales Rep Call Checklist

- Which sales reps will be handling inbound leads?
- What is the best way to notify them of new leads?
- Are there CRM steps we will need to build our efforts into?
- Best way to plug sales into the content we're producing?
- Do you currently use a lead-scoring system? How can make sure inbound leads are graded appropriately?

## YOUR RAMP UP / RESOURCE QUESTIONS



You've no doubt learned a lot about your new client during the sales process. But you'll need to dig much deeper now that you're on the clock. Make sure there is a serious brain-dump from them to you. Learning the ins and outs of their business and industry as fast as possible will help in content creation and allow you to make judgment calls (like which sites should we target for link building) faster. This is easy if you ask for the right information from the start.



### ➤ Ramp Up Resources Call Checklist

- What data & details do you have on your customer personas?
- What are industry blogs that I should be subscribing to?
- Who are the most prominent thought leaders in your space?
- What trade publications and conferences do you attend?
- Where can I find full listings of your products and services? And are there any releases or service expansions planned that I should be aware of?

## WEEKLY MEETINGS / RESOURCE QUESTIONS

Regular meetings with your client team are incredibly important. They are the lifeblood of solid agency-client communication. They allow client teams to get detailed updates and have discussions around what is working and what is not. These meetings also help agencies build momentum and attain buy-in from key stakeholders. Make sure you get your client team in the habit of having these with you early on.



### Weekly Meeting Call Checklist <.....>

- What is best frequency for team meetings?
- Who should be on the invitation list for these meetings?
- Should we have a monthly meeting with key stakeholders?
- What is the best format for these meetings, online or in person?
- Agenda items will change to keep the team current on key initiatives, but what metrics and goals should we report out on a regular basis?

## CHAPTER 2

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# GAME-PLANNING THE FIRST THREE MONTHS

## THE FIRST 3 MONTHS / GAMEPLANNING

Regardless of how long your contract with a client is, getting out of the starting blocks fast is critical to your long-term success. Having an on-boarding playbook for your agency that includes the following three components will establish your agency's leadership and credibility as quickly as possible. They will also focus your efforts, and the efforts of your no-doubt eager client team, on what is most important and proven to produce results the fastest.



What are the three critical components of on-boarding for a new inbound marketing client?





## THREE CRITICAL ELEMENTS / GAMEPLANNING



1

### Perform a Full-Force Content Audit

Inbound success hinges on you having a piece of premium content to promote as soon as possible. Do not reinvent the wheel. Go through their file cabinets until you find something you can polish and put behind a landing page.



2

### Obtain a List of Contacts & Send Emails

Maybe it's from a tradeshow last month. Maybe they purchased it last year. Who cares, just get your hands on whatever list you can find. Import it into your ESP and craft a promotional email for the best landing page you have.



3

### Prepare SEO & Blogging Efforts

Optimizing pages and creating blog content will begin the organic process of driving more traffic. A plan to make both of these an on-going priority will help you better your client's online presence and lead generation.

*Let's dig into them one by one...*





# CHAPTER 3

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## THREE CRITICAL SUCCESS FACTORS FOR ON-BOARDING A NEW INBOUND CLIENT

## THE CONTENT AUDIT/ SUCCESS FACTORS

You and your client are destined to co-author insanely popular ebooks. The webinars you co-produce will attract millions of attendees. But all this best-in-class content will take time to develop. Time you will not have during onboarding. Feel free to start planning (more on page 22), but you need a piece of content fast. Empty their file cabinets. Dig deep into their hard drives. Do whatever it takes to find something of your client's that you can efficiently repurpose into a premium content offer.



## CONTENT AUDIT TARGETS



- Consider repurposing an old, online company brochure with a new introduction to make it more lead-friendly.
- Consider modifying an existing sales sheet to include product information and relevant trend data.
- Consider creating a list of prospect FAQ's and interviewing sales folks to get the answers. Create an offer from the transcript.
- Consider modifying existing training materials into a basic how-to manual of best practices.
- If none of the above exist, "re-package" their existing "contact us" page as a request for a strategic consultation or in-person assessment.

## LEAD IMPORT & EMAIL / SUCCESS FACTORS

Everyone has a list. It might be something your client bought, or from a tradeshow 6 months ago. It doesn't matter. Find it and use it to promote whatever the content audit yielded. Regardless of how flimsy, the folks on this list have some connection to your client's company. If the offer is any good you're sure to see some percentage of opens, clicks and conversions. Hand those off to sales, and analyze the rest. Extract insights where you can, and use the potentially low return to reinforce the need for inbound marketing.



## LEAD IMPORT & EMAIL RESULTS

- Hand off leads generated from the send to the sales team. Make sure they have access to the content that the leads downloaded.
- Save the list and tailor a special promotional email for it when your next piece of content is ready.
- Analyze the list for different company sizes and titles. See how different groupings match up with your client's customer personas.
- Consider sending additional emails (with different messaging) to attractive cohorts.
- Eliminate bad email addresses from the list and use low-deliverability and bounce back numbers to set benchmarks.

## SEO & BLOGGING / SUCCESS FACTORS

It's only a matter of time before your client's website ranks on the first page for the most-coveted terms in their industry. Their expertly-crafted blogs will soon be attracting thousands of views and precious inbound links. The skills and mechanics you imparted on them during the onboarding process ensure this. Answers to important SEO questions were applied in the right way. The right blogging habits were encouraged. Doing this will maximize efforts and drive success for the facets of inbound marketing most responsible for driving traffic, leads, and sales.



## SEO & BLOGGING NECESSITIES

- Build a list of all your client's product and service pages. Which ones get the most traffic? The least traffic? Prioritize which to optimize first.
- Look for low-hanging SEO opportunities first. Do they start their page titles off with their company name? Are H1's present on their site?
- Use the list of keywords identified for SEO to begin crafting blog titles for the team (or external writers) to begin writing. Start simple: How to's, etc.
- Create an editorial calendar for all members (including yourself, external writers) of the team involved in content creation.
- Use what you've learned of their industry to begin targeting external websites for link-building. Be ready to start outreach once there is content.

## CHAPTER 4

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# PLANNING FOR THE FUTURE

## TEACH YOUR CLIENTS WELL / THE FUTURE

By incorporating lead generation (premium content for your first landing page), promotion (the email send) and traffic generation tactics (blogging and SEO) into your onboarding process, you acclimate your client team to the most critical elements of the inbound marketing process. You also expose them to how content is leveraged across their site to generate traffic, leads, and customers.

Make sure they know the key parts of the online sales funnel, and how the different stages form a campaign. Once they do, they'll become greedy people. People who want more premium content offers. People who crave email addresses. People who want more inbound links and qualified traffic from their blog. Use this momentum to start plotting future inbound initiatives that will stoke your retainer.



### Top of the Funnel

Capture lead information from website visitors in the research phase by having ebooks and other forms of premium content.

### Middle of the Funnel

Begin acclimating leads to your voice by offering pain-point specific consultations or assessment offers. These offers solidify thought leadership.

### Bottom of the Funnel

These offers position your client's products and/or services as the solution to a problem. Use demos, trials and samples to clearly convey the value of what your client delivers and start converting leads into customers.

# CONCLUSION

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## MAKE IT OUT OF THE BOX / CONCLUSION

An efficient on-boarding process will not only ensure that your efforts yield results faster, but establish your agency as an inbound authority and a voice whose recommendations and direction should be considered. Use the tactics outlined in this ebook and formulate a process that works for you. Tweak it where needed. Then let it prove itself to your new clients over and over again. Having a proven plan that you can depend on will allow your agency to deliver results and begin building long-lasting client relationships faster.

We hope you enjoyed our ebook on client onboarding. But don't put the cart before the horse. Learn the services you should offer and get a better sense of how to deliver what matters most to your clients by downloading HubSpot's ebook on [The Four Core Services of Inbound Marketing](#).



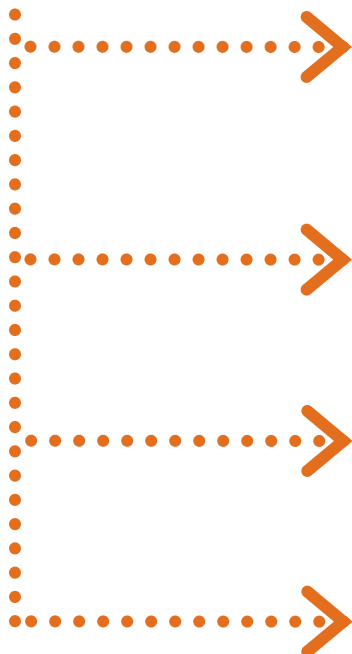


## HOW HUBSPOT CAN HELP / CONCLUSION

Many of inbound marketing best practices, and the foundation of a successful onboarding process are built into HubSpot. Our all-in-one software platform allows agencies to manage an efficient and measurable client engagement from end to end. We simplify marketing by pulling together everything you need to grow your or your client's business in one place.



Tangential to critical success factors of new client onboarding, online marketing agencies can:



Use HubSpot's content management system (CMS), blogging, search engine optimization (SEO), and social media tools to **generate more traffic** and leads from your or your client's website.

Use HubSpot's landing pages, call-to-action module and testing functionality to **drive more leads** from your or your client's website.

Use HubSpot's segmentation, lead nurturing, and email marketing tools to ensure your website leads are **sales-ready**.

Use HubSpot's measurement tools to **analyze** which marketing campaigns are generating leads, to qualify leads by sale-readiness, and to tailor content for greater impact.

# MORE RESOURCES

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## MORE RESOURCES / HUBSPOT

Our Channel Account Managers help hundreds of online services agencies understand how the Four Core service offerings of inbound marketing can help them earn more retainer clients and grow their business.

[Request a Strategic Consultation to Learn How Inbound can Help your Agency Grow.](#)

Get a guided tour of our all-in-one marketing software, and learn how HubSpot can help you deliver and report jaw-dropping inbound marketing results to your clients.

[Request a Guided Agency Tour of HubSpot's All-in-One Marketing Software.](#)



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