Memberspot

Agency Training: Client Onboarding - Your Next Growth Engine

In the first chapter, you'll discover how positioning your service correctly can make or break the onboarding experience for your clients 🤔.

We'll also show you the common pitfalls to avoid, and how to structure your after-sales process for a long-lasting relationship with your clients 🤝. And you'll learn how to use technology to automate parts of the onboarding process 💻.

The second chapter is a **blueprint** for a best practice agency onboarding, you can use it as a **template** for your agency 📝.

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I. Onboarding Training

🏆 In this chapter, you will learn:

- How the positioning of your service impacts the onboarding process and how it can affect the client's experience.
- The consequences of a bad onboarding experience, including potential loss of clients and damage to the agency's reputation.
- Common onboarding mistakes that agencies make, and how to avoid them.
- A step-by-step after-sales process for maintaining a positive working relationship with the client after the onboarding period.
- The key parts of the onboarding process and how to effectively manage and deliver them.
- The day-to-day working relationship between the agency and the client after the onboarding period.
- The best structure for creating onboarding videos to ensure they are effective and engaging.
- How to automate parts of the onboarding process using other tools to save time and increase efficiency.

Introduction to this Training

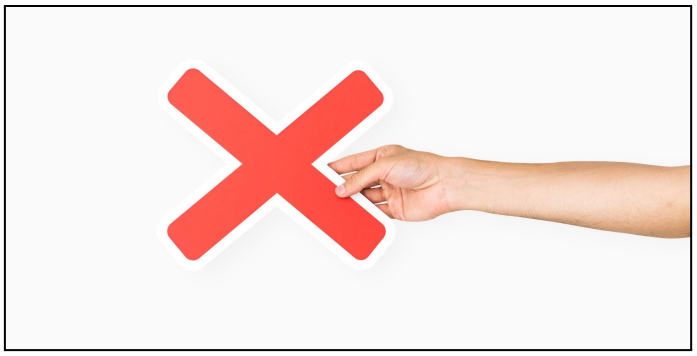
How do you design the after-sales process and the onboarding of agency clients?

🚀 "Eliminating Friction: The Importance of Proper Onboarding for Agencies and Coaches Selling Services Online" 📚

- After sales and onboarding is extremely important when agencies and coaches sell services online.
- In this phase, the customer may still be sceptical.
- Working together only virtually usually requires greater communication.
- Most points of friction in the cooperation with new agency clients can be eliminated through a proper onboarding process.
- We give you the best insights from hundreds of successful onboarding projects delivered through our Memberspot e-learning platform.

Content of the "Onboarding Training" course

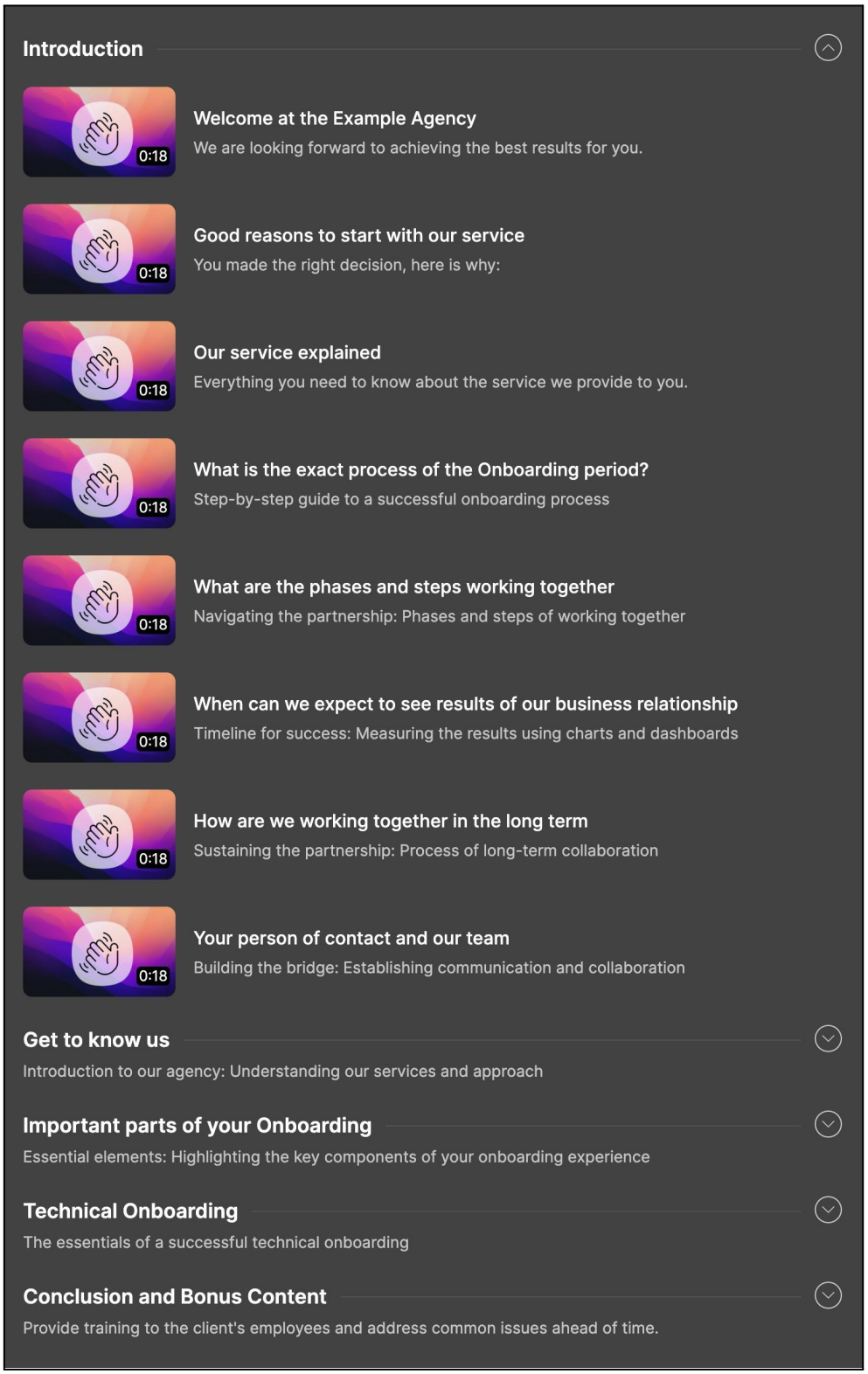
Onboarding 101: Understanding the Importance and Avoiding Common Pitfalls
Content Chapter I - Training



- 🤔 Why is onboarding so important?
- 🤯 What are the consequences of a bad onboarding?
- 🙈 What are the most common mistakes during client onboarding?
- 💪 Step by Step After-Sales Process
- 🏆 Parts of a Successful Agency Onboarding

Content Chapter II. Agency Onboarding Template

This chapter can be used a blueprint to start building your own client onboarding.



Get your blueprint for free: https://memberspot.io/agency-onboarding

How the positioning of your service impacts the onboarding

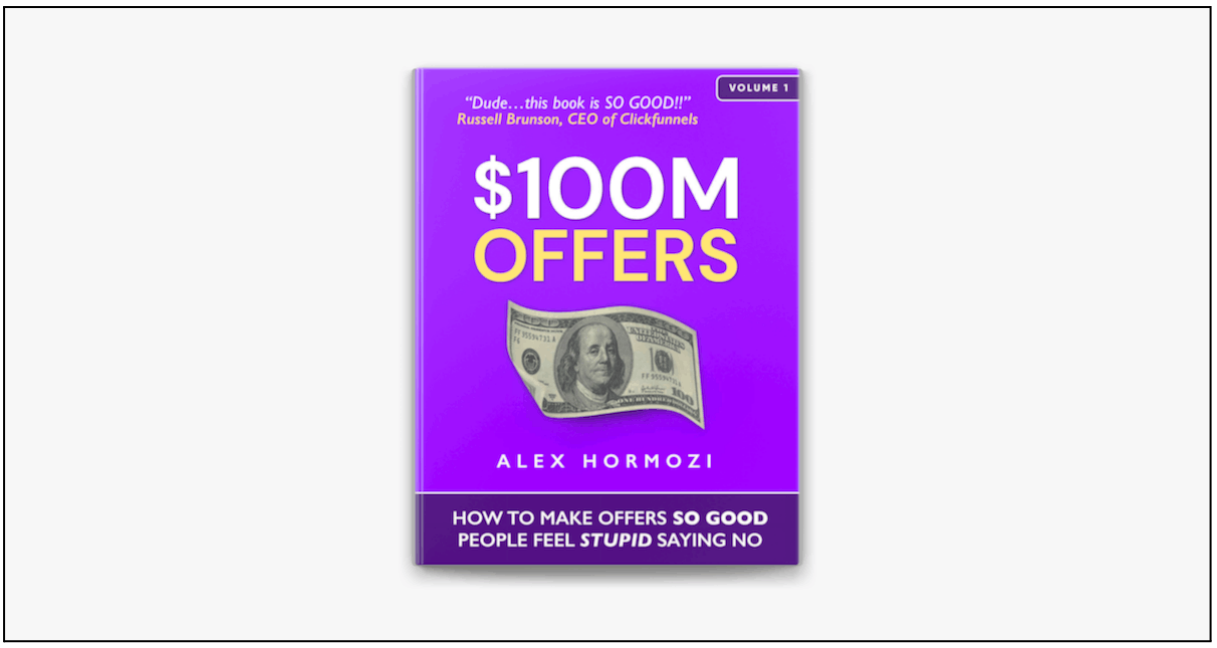
Scaling Success: How the positioning of your agency and service affects scalable growth through streamlined onboarding delivery.

Do not offer too many different services

It is easier to streamline the fulfilment if you decrease the complexity of your offer and focus on a few very large problems you solve. Narrow down to one specific customer avatar. This will make marketing and fulfilment much easier. The German word "*Bauchladen*", as in the picture above, means literally belly store. This term often refers to companies offering too many services. I.e. an agency doing SEO, podcast, videography, images or YouTube marketing at the same time.

Book recommendation:

$100M Offers: How To Make Offers So Good People Feel Stupid Saying No by the author Alex Hormozi.



From his book: Be a Specialist Not a Generalist

The debate of whether to be a specialist in one specific niche or to be a generalist is never going to end.

But here's what Alex Hormozi thinks about this:

> *"A course about Time Management can be sold for $19. The same course if we name it "Time Management for sales professionals" will cost $99. The same course if we name it "Time management for outbound B2B sales" will cost $499. In the last one, the client will say "this is specifically for me!". If we niche even further down, we can name the course "Time management for outbound B2B power tools & gardening sales reps" and sell it for $1997."*

What are the consequences of a bad onboarding experience?

Falling Short: Understanding the Consequences of a Poor Onboarding Experience
A poor onboarding experience can lead to a lack of trust and communication between the client and agency, resulting in issues such as lack of participation, poor results, conflicts, unpaid invoices, lack of legal certainty, and high support costs. Ultimately, it can lead to the cancellation of the cooperation and non-renewal of the contract.

Consequences

- Cases of cancellation

- Lack of client participation in the working relationship
- Poor customer results
- More conflicts and stress
- Unpaid invoices
- Lack of legal certainty and proof of cooperation
- Higher support costs
- Cancellation of cooperation, i.e. no contract renewal

Some additional potential consequences for social media recruiting agencies and lead generation agencies could include:

- Difficulty filling job positions or generating leads: If the agency is not effectively communicating with clients or providing them with high-quality candidates or leads, it will be harder for them to meet their recruitment or sales goals.
- Loss of clients: If the onboarding experience is poor and leads to poor results, clients may choose to take their business elsewhere.
- Poor reputation: Negative reviews or word-of-mouth can harm the agency's reputation and make it harder to attract new clients.
- Reduced revenue: If clients cancel their contracts or do not renew, the agency's revenue will decrease.
- Difficulty scaling the business: Without a strong onboarding process in place, it will be harder for the agency to effectively onboard new clients and scale the business.

- Difficulty maintaining consistency: If the agency is not effectively onboarding clients, it will be difficult to maintain consistency in the services offered and the results achieved, which can lead to client dissatisfaction.
- Difficulty in building trust with the client: Poor onboarding experience can lead to mistrust between the agency and the client, which can have a negative impact on the relationship, and make it hard to build trust again.
- Difficulty in tracking and measuring the success: If the agency is not effectively onboarding clients, it will be harder to track and measure the success of the agency's services, which can make it hard to identify areas for improvement.

Common Onboarding Mistakes

What are the Common Mistakes during the customer onboarding?

1. Lack of communication: A common situation in which lack of communication can occur during the customer onboarding experience is when the agency fails to provide regular updates to the client regarding the progress of their recruiting and lead generating efforts. For example, the client may not receive any information about the number of leads generated or the status of open job positions.

2. Misunderstandings: A situation in which misunderstandings can occur during the customer onboarding experience is when the client and the agency have different expectations about the scope of the recruiting and lead generating services. For example, the client may expect the agency to