**MeetRoost Live with Dr Ben (Our Onboarding and Longterm Success Blueprint) (1)**

**Ben Adkins:** Everybody document

[00:00:07] everybody dr. Bernanke and see her in welcome shoe. This special session of our weekly meet reus meetings, where we're going to be talking about client onboarding. And in the past, I've talked about, you know, a sales process. Like how do we actually keep track of all of our leads? How many leads do I contact every week for the meat, Ruth service or any of our services?

[00:00:25] How do I actually do that? And how do we really stay on board with how we stay in touch with people? Like, how do I wake up at the beginning of the week and know I've got to follow up with these 10 people. And then I've got to reach out to these other 10 for the first time. So we've gone through that in the past.

[00:00:39] And I walked you guys through pipe drive and how we actually rock pipe drive and rock that all out to keep tracking everything. But there's another side to it. Once we actually bring the client on board, we use an app called Trello. And Trello is how we sort of keep a process down of how we get our clients on board, how we walk them through the onboarding process.

[00:01:01] Many of you always ask me how long do these clients stay on our clients, stay on typically for a long time. And it's the reason is, is because we onboard them correctly. Maybe people don't onboard. Well, how many of you feel like you need, you need some work with how you bring a client on board once you've got them excited and they bought in, so that they're, they're the kind of client that sticks around.

[00:01:22] Yeah. So I want you to look at this. This is a onboarding board. This is for SMS clients. Um, and this is something that's fresh on my mind right now because of some of the stuff we're doing with our pizza money program that some of you have seen. But I wanted to show you this, because I think this is a super important that you sort of understand how this works and how we built this from scratch.

[00:01:43] I am less worried about you. Copying this exact thing or copying something exact from us. I want to actually teach you the skills of building one of these from scratch, so that you understand anything that you do. You can build an onboarding process for your team using this method, and it's going to help you.

[00:02:01] Does everybody understand that it's not just about copying what we're doing? It's about understanding the thought process behind what we're doing, and then using that thought process to build something that actually fits you. That's super important. It's it's understanding how it was built, the framework and the thoughts behind it.

[00:02:19] Yeah. So that you can build it, something that fits your, they should not necessarily our organization. And so what we've got here is, is this, this is how we onboard our SMS clients. And like I said, whether you're doing roofs and you're bringing in lead gen clients, it's a route, the same sort of timeline.

[00:02:35] Okay. It's about the same sort of timeline. So what I'm going to do is. In the replay, I'm going to give you guys this template for our SMS stuff, but you can absolutely modify this really easily to what you're doing because the actual onboard process for what we are doing and meet roost with onboarding clients is almost the exact same timeline.

[00:02:54] Uh, in a lot of the things that we're doing are actually pretty much the same too. So you'll have to move. Some things will be different, but I want you guys to see just a random thing rather than something specific, because. You have to understand the thoughts behind it. Okay. So just to set the stage, let's say that we've brought on a client into our agency.

[00:03:14] They've signed up and they're ready to go. And what we want to do is in the next three months, we're going to do our best to make sure that the client is bought in the client is doing the stuff that they need on their side to do, to support us. But also that we are seeing the things that we need to see for the client to be successful.

[00:03:33] The thing that I've got to teach you guys today, that is going to be the number one thing I teach you. And the number one thing that's going to help you in the next few years of your life with an agency is this the number one reason your stuff will fail and a client will stop paying you. Does anybody have a guess?

[00:03:52] The number one reason that what you're doing will fail and a client will stop paying you. What do you think the number one reason is what do you think?

[00:04:06] The number one reason that you are going to fail is the client not complying on their side, not doing what they're supposed to do. On their side. They won't do it because, because you didn't onboard them correctly, you didn't stress the importance of what they need to do on their side. There's so many times as agency owners that we think they pay us and they don't have to do anything.

[00:04:32] It never, ever works like that. Not with Legion, not with sending people back in there. The client has to take some responsibility on their side. No, I don't mean they have to run the tech. I don't mean they have to do anything with the marketing, but they have to at least understand what's going on and what they need to prep their team to do.

[00:04:55] Does everybody understand that if you're running lead gen campaigns for roost? And the client has not prepped all of their staff about following up with the leads every day. Not understanding that, Hey, this, this is a promotion that we have out there right now. When they answer the phone, your stuff is going to fall on his face.

[00:05:13] You are going to hear this, please write this down, write this down, make sure you understand this. The number one thing you're going to hear from potential, you know, longterm clients that will fall out on you. They're going to tell you in the first month, when you're sending leads, they're gonna say, yeah, you're sending us leads, but the leads aren't any good.

[00:05:33] The leads aren't any good 99% of the time. That is complete bullshit. The reason the leads aren't any good is because they've not trained their staff to make the leads. Good. Do you understand what I'm saying right now? Meaning someone will call the staff will be ill prepared to do what they need to do to convert that lead.

[00:05:56] And so the lead will either not book an appointment will not book an appointment or like they'll call three days later instead of calling right away. And so the lead will have cooled down or when the person comes in, they won't follow up with the things you told them to do to follow up. Once they do come in, or once they do interact with the client.

[00:06:16] And when they don't do it that way, then all these leads that are discounted or freebies won't turn into full business. And so what they'll tell you is some of them they'll say, well, the leads weren't any good, but you've got to walk through the process with the client and make sure they understand all the pieces that they need to do within the first few months to make sure they're good.

[00:06:37] You have to make sure they're trained to actually convert the leads from I'm just so, so too good. Does this make sense to everybody? They cannot convert those leads without you telling them, how does everybody understand that when you onboard a client, you've got to educate them on what they must do.

[00:06:59] And you've got to get buy in from them too, because if they live into this, they're going to be gone in two to three months. And I don't want you all to go through what you're doing. I don't want you all to go through what you're doing for a client to stick around for two to three months. And you walk out of that relationship feeling like you are a failure because you're not, it's just, maybe you didn't get them prepared to do what they needed to do.

[00:07:25] Now they're busy. They're busy. You're not expecting them to do a bunch of busy work. You're expecting them to build in simple processes into their daily routines that take very little time, but deliver a big result. But if they don't do those routines, it's a problem. So one of the things that I have to make sure I stress before I get into this is absolutely this.

[00:07:49] It's make sure you onboard the client correctly. You train them, you follow up to check on them. The first month to two months to three months are critical. If you get it right in the first one to three months, they'll stick with you nearly forever. If you don't get the first three months, right. Then it's going to be topsy turvy, and it's going to suck and you're going to feel like you're fighting something that you can't wit.

[00:08:15] Okay. Does this make sense? Does this make sense

[00:08:24] now? I will say this also, does everybody understand based on what I just said, why? I don't like working with people that don't have their shit together in the first place? Does everybody understand this? This is absolutely huge. If they don't have their shit together in the first place, they don't have the ability to do what you need them to do.

[00:08:46] And you're going to walk out feeling like a failure when there was no way they could possibly do what they needed to be selective with your clients, be selective with your clients. Make sure you're working with people that have it together. And you're good. Can I tell you one big secret? That is a huge secret to my success in terms of clients that we take on in terms of coaching, in terms of all the things that are super important.

[00:09:10] And if you start paying attention to this, you are going to be wildly successful. Here it is here it is my key. Is absolutely this. I do not take on any clients that I don't. I think we'll get to where they need to go in a year to two years. Even without me. I only take on clients that I think get to where they need to go without me.

[00:09:39] What role do I serve if they don't need me? What role do I actually serve as someone that's driving leads as someone that is. Helping them out consulting with them. If they're going to get there anyway, what role do I actually serve in this relationship? Does anybody know Steven nailed it? I am the accelerator.

[00:09:58] I go after clients that have it together that have good things going on, they're going to get to where they need to go in a few years. My goal is to get them there in six months, or if it's going to take them five years to get them there in a year or two. Does everybody understand that then when you do this right lead gen, especially.

[00:10:14] When you do this, right? Those are the people you want to work with. That's the feeling you should get when you talk to them is they've got it together enough to get there themselves, but you will help them accelerate it by the way, by the way, I tell them that in the meeting, a lot of times I'll say, listen, I think you're going to get there eventually anyway, but I'm going to help you get there faster.

[00:10:33] You want to see a great close to a sale. That's that's a great close to a sale. I'm going to help you get there it half the time. That's a huge key. Okay. So, all right. I said, somebody asks the question Atkins, how do you make sure you're not having to track them down? How do you make sure you're not having to track them down in the first place?

[00:10:52] Are you ready? Are you ready to go through this? I've excited when I start singing, you know, I'm excited. So. The idea here is, is this as we want this Trello board now how this Trello board is, this is for SMS clients, but like I said, you could absolutely use this for what we're doing too. With some modifications.

[00:11:11] Here are my important points. Number one, the second they sign up with me, I'm scheduling an onboarding call within one to two days. Does everybody understand the timeline and what, what, at least from a 10,000 foot view? What this is? Give me a yes, if so. Okay. Number two set up client assets and tech for SMS.

[00:11:34] This is one thing for what we're doing with Facebook ads and getting control of their page enough that we can do what we need to do. I try to get this done in the first three days. Does this make sense, by the way, if you're having trouble with a client and you're having to chase them down to get this stuff, you did a shitty job around here.

[00:11:53] Does this make sense to everybody? If you have a client that you're having to chase down, it's because you onboarded, the first part of the onboarding was completely messed up. Okay. Make sure you're there set the expectation so they know what you expect of them. This is key. They have to know what you expect of them.

[00:12:15] Just like, they have to understand what to expect of you. Make sure you get that out there. The next thing is we schedule this client training call within seven to 10 days. Now, why is this training call? Not the onboarding call because the training call comes after we get the tech set up and I can actually show them what their ad looks like, what their landing page looks like.

[00:12:33] All those things. Everybody follow me there. Give me a number one in the box. So I know that we're good. And I'm just going to keep asking you for number ones as I'm going through this. So that I understand that all this makes sense because you've got to internalize this. This is huge. All right. From there, it's the client jumpstart promo, and this is where we get things started.

[00:12:50] And we're trying to get some, some data out of the gate. Is this going to be our best week of promotion? Is this going to be our best week of promotion that we put out through that first ad? No. Absolutely not, not by a long shot. Now this is for my SMS client stuff, but it's the same thing. It's not ever going to be the best.

[00:13:07] The first thing that you get out there and you got to prep them for this, the first stuff's not going to be the best, but it's where we start to dial things in because we've got data. So we do this jump start promo from then we check it on the client two weeks. How are things, what are you seeing on your end?

[00:13:21] Are you getting phone calls? We check in in four weeks, by the way, is this a long phone call? It's like, you can look at this and think that you're going to be on the phone all the time, but is this a long phone call? It's literally minutes. Hey, let me know what you're doing. I'm going to learn what's happening on your side.

[00:13:38] I'm going to tell you what's happening on our side, how we're going to fix this and dial it in. And this is what it is after these first two. You're going to check up in the next month. Should you check in maybe quicker if you don't see leads coming in and roost on your side? Yeah, you can check in quicker, but this is what we do.

[00:13:55] All right. It goes from lots of touches in the first month. Lots of touches on the first month running it steady for a month without too many touches, just doing the work, checking in, checking in fully onboarded. Now, during this time, you should be seeing leads come through, but you check in to underst to make sure that they understand what they're doing with those leads.

[00:14:16] Everybody good with this from at least a 10,000 foot view. First three months, give me a number one in the box.

[00:14:26] Okay, this is where it gets interesting. This is where it gets. Interesting. I'm going to click on this. You tell me when you can see this open, everybody see this open.

[00:14:39] So I want you to understand, before I get into this, does everybody see this zero out of 42 here? Zero out of 42 on your screen. What that means is is there's 42 steps to onboard this client correctly. There's 42 steps to onboard a client correctly. Now is, are any of these steps incredibly time consuming?

[00:15:03] No. No, but this is making sure that we get all the things done and I want you, this is what I want you to see with Ruth. That's a specific thing with, you know, websites. It's a specific thing. But it's a checklist to make sure you don't miss anything. So I click this open and can everybody see what we've got here?

[00:15:28] Could everybody see what we've got here on your screen? Just make sure that it's showing up. So in my onboarding call for my SMS stuff, I want to make sure that I've got the business name. Correct. And usually I've got that right away. I've got the contact name. I've got all this stuff, but I want you to understand this before I actually walk you through it.

[00:15:47] This is what we call a template card. Does everybody see down here when I got it checked as a template? Now, what that means is this, this is the card that I'm always going to start from, but watch what happens real quickly. As I'm using this, I click it. I click create card from template. I'm going to name it after the client.

[00:16:12] So. For this one, I'm just going to say Sal's pizza because this is our, uh, our restaurant stuff. Both of these are checked, create card. Everybody see how I fall right here, over here in the corner, over here in the quarter, hat created a new client Sal's pizza, new card, just for sales. And then it copied all the stuff.

[00:16:34] Give me one, if you can see that.

[00:16:40] So, what I'm doing is I take this template with all the steps. I never edit it. This is how I always start, but I create, I create something that's specific for the business that I'm working in there. Everybody good with that? Everybody good with that? Just give me a big yes. If so, it, all it is is I want this card to sit up here forever so that I can always build new client templates from it.

[00:17:07] Okay. So that's, that's extremely, extremely important to me that that's there now, moving on into sort of this next step here, when I actually click into this and I've got these things open, I've got some things that I've got to fill out. So watch what I'm doing here. So I'm clicking into this. So it's saboteurs pizza.

[00:17:30] Salvatore's pizza, contact name. What I'm looking for is, is it every business? Typically the owner is not who I'm talking to on a daily basis. Does everybody, why is the owner not the person I'm going to talk to on a daily basis or the head chiropractor or the head real estate agent? Because they're too busy.

[00:17:48] And if I depend on them, if I depend on them to get me all the things that I need, I'm going to be waiting for weeks to get those things. So I want the person that's actually going to be responsible to get this on board. And so typically it's an office manager, it's a manager. And so we're just gonna say at Salvador's we're gonna be talking to buddy.

[00:18:08] Okay, buddy Jenkins. Everybody got that.

[00:18:19] So I'm going to say this. I also want to know what's the best way to call buddy. So I want a phone number. Okay.

[00:18:34] And so I want to make sure that that's the best place to call that's. That's my contact now with my SMS service, that's a whole other thing, but that's what we got also. When do they want to get trained? When did they want to get trained? So if they said, you know what Africans we want to do August 10th, August 10th.

[00:18:55] At 4:00 PM. That's what we're going to do it. So notice I start checking these boxes off. As I fill this out. Now, this is something that's specific to specific to, um, the SMS stuff, but client Facebook access that's important. Did we get that? How do we get that? I have a video that I send the clients. This is how you do that.

[00:19:17] This is how you do that. This is how you give us access. So I sent that to them. Make sure they've got that. On the call. I try to get them to give me permission to their Facebook page and walk them through it. Does everybody understand that? And when I have it, we click it. Cause I can't do much for roost until I've got that.

[00:19:38] And then I screenshot the client website stuff is a card cover. Now what I mean by that is this is I'm going to go over here and I'm going to say, do I have a picture that's going to help me identify this client at a glance faster. So I've just grabbed that. I'm going to save that. I'm going to go back to my board.

[00:19:58] I'm going to go up here to cover. I'm going to upload a cover image. I just screenshotted that from their Facebook page, by the way. And let me make sure I got it. There it is. And now at a glance, does everybody see how that pops up? And it's much easier to see. So if you've got five different people here, it pops up much easier.

[00:20:25] That's the idea. So we go in here from here and now we've got all this, so I've got my client covered now. Here's the thing. That's everybody see these little warning signs down here that I've got. This should be familiar because it's the same thing that pops up for us. It's the same thing that pops up for us where pipe drive.

[00:20:44] Right. So I just use an icon and I'm making sure that we've got this here. So clients set up and it's just you type in warning like this, we've got this. And all I'm trying to do is every time I see every time I see a warning sign, it means I must schedule a date. I must schedule a date. So does everybody understand that?

[00:21:03] Every time. I see a warning sign. It means I must schedule a date. So client assets set up, when am I going to do that? Okay. So what I usually do is this, I know I'm meeting with the client for their training call on. So I said, what the 10th or 11th, somewhere like that. August 10th at four. So I'm going to actually put this in here.

[00:21:22] August 10th is when the meeting with the client. So I've got to have the assets set up before that. So I'm going to try to have the client assets, like their ads and things like that. Set up on the seventh. Everybody. See what I just did from a very basic standpoint. Don't check these yet, by the way. Does everybody see what I did?

[00:21:40] All right. Now, I want you to sort of see what happens here. I'm going to actually jump out of this for a second. Does everybody see calendar up here? You can see calendar type. Yes. Or why in the box? So I know that this is coming through, so it's up here. It's calendar up here, the right side. Okay. You click calendar is everybody.

[00:22:07] See how now I've got these little warnings on my global view that says client assets set up client training call. So I can literally click into this and it shows me what I need for those things. From a calendar view, I can wake up every morning without having to look at the cards and I can see where, where are we?

[00:22:29] Now, the other thing that I will do is I'll get out of this calendar. You just click it again. When I have them done with this part and I'm ready for, to actually go onto the next part. Like I've got everything checked, but these, and I'm moving on to this. I move it from here to here. And I do that. So from a visual CEO, looking at a dashboard standpoint, I could log in, even if I've got people hired to do do this for me, I can log in and see where the progress is on each of these things.

[00:23:01] Does everybody understand when you have 14, 15, 20 things at once going on how that gives you a 10,000 foot view of what's going on in your business right now is even if you've got other people looking at it, Does everybody understand how this level of organization puts you in a different place as an agency owner.

[00:23:23] And do you start to understand how, you know, what is the most important thing that I need to do today or first, instead of it being jumbled in your head and you having to juggle it there, do you all know, do you all know how much better you will sleep at night? How much better you will treat your clients?

[00:23:41] How much better everything works when your brain is not responsible for having to juggle the scheduling stuff anymore. Having to juggle the information that you've got to keep track of anymore. I'm going to tell you guys, a lot of people that I know are not successful because of great portion of their brain goes into having to keep track of this stuff and not the high level stuff.

[00:24:06] Make sense. Does this make sense?

[00:24:13] So I moved the card. I moved the card along with the task blocks. Okay. Everybody ready for the next step? I won't do all of these, but I just want to kind of show you where we're at. Okay. So cool. Cool, cool. Cool. So let's go through this. So next I go in. And I'm just like, it's, it's that Friday? It's the August 7th.

[00:24:35] It's the Friday coming up and I'm saying, okay, I got to get this part died. So I go in and I set up for this. It would be SMS, but for others it would be, did I get the Facebook ad set up? Did I get my meat roofs page set up? So instead of SMS set up, you would say beat reus page set up. So campaign set up right from there would be like table cards created ship.

[00:24:57] So for really a roost, this is, did I set the business up and roost. Did I set the funnel up and roost? Did I set the campaign up in roast? And I would probably pop in the URL of the main campaign here. And then did I set up the Facebook ad? That's going to promote the campaign. Does everybody understand what these four things would be instead of the SMS stuff?

[00:25:21] And like I said, I'm not interested in just giving you a, Hey, here's what we do for this. I want you to be able to do this from scratch and make it your own because how many of you here? Offers something else besides what's your offering with lead gen for meat routes? How many of you do social posting?

[00:25:37] How many of you do websites? How many of you do newsletter stuff? How many of you do other things for everything that you do for a client? For every service? There should be a specific board that is for that. Or you should have a combined board that organizes it in a good way. This, does everybody understand that?

[00:25:58] How many of you feel like. A weight is being lifted off of you for handling clients, because you're now starting to see how you keep your head straight. You're now starting to see how you keep your head straight. I don't care that you copy everything that we've got. That'll help you. That'll help you, but it's more important that you understand how to go in here and add your own items.

[00:26:23] Now the beautiful thing is at the end of this, I don't have to schedule anything because I've already got a client training call scheduled next. But what I do have to do is when I've done with this, I put that down and I kill this deadline because the deadline's done. So I remove the date above here. I leave this date.

[00:26:44] I leave this date because that deadline is coming up. So once I have all these checks, I click out, move it here. We get over to the calendar. The date here is gone because I got a dime. Now we've only got this left, this everybody. See how we're checking boxes really, really well. And you see Sal's pizza moving.

[00:27:06] Now, let me ask you a question. Do you think I ever slip and show this to the client? Do you think I ever slip and just show this to the client? Just to kind of show I do. I absolutely. Do you know why? You know why I don't show them the other stuff, but you know why I'll go through and every so often I'll show them this list because when a client sees this list, how many of you are impressed by this, this level of organization?

[00:27:37] When I, when I pulled it up and showed it to you, how many of you were impressed? How many of you were excited? How many of you ever felt like Atkins has his shit together? A little more than I do. A little more than I do, and this is going to help me when you slip and show this to a client, it's going to let them know they're in good hands.

[00:27:55] And they made the right decision. It made, this is, this makes it. So I have no problem. I don't show them the other stuff, but I like to show them that I have a checklist of everything that we're going to do for the next three months to make sure that they're successful. And the visual behind this, the visual behind this.

[00:28:16] Is absolutely huge. Absolutely huge. Does everybody understand the clients pay you a lot of the time? This has to be more organized than they are. It's big. Uh, Virginia says, are you going to cover how to get the customers to pay or the method you use to collect payment? I actually can't Virginia. We have some stuff inside of the member's area.

[00:28:39] I'm pretty sure Ashton don't we have some stuff that like how we take payments. Inside of the Dai members area already. I believe we've got a video of Virginia of how we take payments inside the Dai members area. Uh, if Virginia, if you jump in there that should be already in front of you. Uh, and it's pretty much the same now as it was then hopefully that helps muddier.

[00:29:02] So from here, from here in Virginia, if there's anything that you don't understand, when you go through that video, yell at me. Okay. Tag me in the group. I'm there for you. So from here, I'm onto my training call. I get on the training call and on the training call, I have to make sure that the client understands the tech.

[00:29:23] I have to make sure the client understands the promotion that we're running for them for SMS. You know, they have to understand what's going on. But most importantly, we don't have SMS stuff, but the client has the staff training scheduled. Everybody got that. By the way when I get to this card, I can go back to the first card, get rid of this deadline, remove this date, check this box and we're moving forward.

[00:29:48] But I have to make sure that the client has a staff training scheduled. Does this make sense what they are? And I've got to tell them what they actually have to train their staff. So I show them, I show I would put it here. Client understands the tech client understands the promotion. You would write something to the effect of client has seen the campaign on the web.

[00:30:11] It understands client. It has actually opted into the account. So I would have client has opted in as a sample. Does everybody get why I would have the client opted to their own page? Because once they get the text, once they get the emails, they're going to start to understand how it works. They've got to schedule something with their staff to walk them through how this works.

[00:30:35] If they want to have their staff on this call with us, or they want to schedule another call with their staff, I will absolutely do that so I can walk them through it and do the training myself. But I want to have a personal training with. Our admin person at the place first, does that make sense to everybody?

[00:30:54] Does that make sense

[00:30:58] now, before I get off the phone with them, I'm making sure they're either training their staff or I'm training their staff and we've got that scheduled. You can go in and you're like, listen, all I have to do here is if they don't want to do it, I go in here and say, okay, when do you want to schedule the staff training?

[00:31:13] We put a due date to that. Okay. We put a due date to that, but most important thing is this, before they get off the phone, I've got the next thing scheduled, which is the client check in call in two weeks. So today's like, let's say the 10th was our training. So two weeks would be right here. August 24th.

[00:31:36] It's scheduled by jump out of here. I go to the calendar, August 24th, client jumpstart, check in. That's how we do it. Okay. So going back to this, obviously when we're done with all of these things, except for the thing that we had to schedule next, we're moving it over to here. So we can see from a 10,000 foot view where it's at.

[00:31:58] I don't think I've got to go through all of these with you guys, but does everybody understand how this works? Does everybody understand how this works? So what I want to do for you is this is. In your training and I'll just give you this board so you can build what you need to out of it, but in your training, what we'll do is, and how about, how about what I do is if you give me a few extra days, I'll build you a specific board for, um, what we're doing, what we're doing.

[00:32:32] I'll build the actual board so you can see what we're doing and it will be more meet roosted, lead gen friendly. So you don't have to like reprogram a bunch of stuff. Here is I will give you this, but I want to kind of show you something real quick so you can see this. Let me find it real quick so I can grab it for you.

[00:32:59] Hang on. Almost there.

[00:33:05] Almost there.

[00:33:12] Can everybody see this on your screen right now with the green button at the top?

[00:33:26] John John brought up Atkins there's folks that surely don't know this. Um, you're expecting to do a brain switch. No, no, no. John, I'm going to build this. I'm going to build what I've, what I've not done. John is John because of the recent, uh, John, are you still there by the way, just making sure buddy. So John, the reason I had this one handy is because I just did a course and made it sharable the board that we do for that lead gen.

[00:33:52] I didn't have shareables so I couldn't show it today. And I've been swamped. I'm just going to be completely honest with you. It's swamped. But what I'll do in the meantime, John, is I will get our board cleaned up and get the, so John, our board has clients on it right now. And if I were to show that I'd be exposing clients, I don't have a sample board like I had for this.

[00:34:10] And so, John, what I'm going to do is I'm going to build the sample board so that it doesn't have any of our clients on that'll take me a couple of days, but I'll get you one that's specifically aimed for meat roost. And so you've got that. So John forgive me for being swamped and not having the sample board with my clients off of it.

[00:34:25] I can't expose that, but I'll get you the next couple of days so that you have a version of this that is. What we do for that stuff. Does that make sense, buddy?

[00:34:37] Does that help? No, no, no. John says, sorry, sorry. I truly apologize that. I just tell him that dot a hundred percent. I feel like that is an excellent, excellent question. There's no apology needed. And what I'm going to do is I'll make sure you have that. But as I said, the reason is I didn't have time to get it cleaned off before we got to our life today, but I did have this one handy.

[00:34:56] The thing that I wanted you guys to understand is everybody see this at the top. When I give you the link to the meat roost board, all you got to do is create board from template and it will copy to your account. Okay. So it will copy it to your account. If you want to make any edits to the process of onboarding, all you gotta do is go in and basically edit this template.

[00:35:18] And then everything you build from this template will work. Okay. We'll pretty much work. Uh, what level of Trello is this? I don't know. We pay for Trello, but I don't know what level it is. I'm pretty sure that at the very basic level you can copy our, you can copy our template. I think the upgraded levels are when you get into like a lot of different users and stuff.

[00:35:39] Um, We have gold. Alicia says, thanks, Alicia. Um, but like, I'm pretty sure that you all are going to be fine with a very basic level of Trello. And until you start adding in other people or you have a bunch of different boards, and so you don't have to really upgrade most likely, and I'm not a hundred percent on that, but you don't have to upgrade most likely.

[00:36:04] Until, until you start having staff members that are jumping in here and you get a bunch of boards. Does that help? Roger? That's a great question, but man, that's a great question. Um, so Alicia says a hundred percent. You guys will be great at the very basic level, um, of this with, with that. If you don't have a bunch of staff members and stuff in it, so you should be good.

[00:36:31] So. The idea here is, is I will get you a board. That's very much for lead gen. Like we're doing and meet roost. You guys will have that. You click up here, it'll post it to here. You build everything from your template by clicking here, creating card from template. And I'll go back to our board that we were using before.

[00:36:52] Make sure I get there. Hang on. Well, in theory, I'll get back there. We'll say there we go. And so. I just want you all to understand this while I'll give you the step by step board that we use. I want you all to understand this from a conceptual level. Does everybody here understand this from a conceptual level to where you understand how to go in and edit certain things like that?

[00:37:17] Okay, cool. Cool. So. You know, you can do a lot of interesting things with this. You can do a lot of interesting things with this. You can have, can everybody see up here? Like where are these three dots? Are?

[00:37:35] Can everybody see where these three dots are? You can click here and let me zoom this. Hang on.

[00:37:44] It's right up here, these three dots, you click it, you can watch these cards. And so certain people on your team, like if you had somebody on your team that was responsible for this, they could watch the card and they can get notifications for this. There's tons of things. You can do that once you're managing a team, this lets everybody know what's happening.

[00:38:04] And this is extremely effective. We do an absolute ton of things with Trello to keep track of things. All that said to say this, I'll get you guys something, it won't be tomorrow, but I'll get you guys something. Um, hopefully in the next few days with this replay of an actual board that fits meet roots, like I said, I just have to kind of clean off the one that we've got, but can all of you use this and do this and from the mechanics of it, do you understand sort of how this works?

[00:38:33] From at least the mechanic standpoint. Does everybody understand how this works? How this is going to keep you more organized, how you can use this to actually show clients that you've got your shit together, how you can actually use it to keep your shit together. It's not overly complicated. It's just understanding the flow of how it works.

[00:38:51] Good. Is this, does everybody understand why right now I wanted to do this instead of a funnel this week and why this was important. There's so many of you right now about to close clients, about to lock things down. And I want you to have this side of it. I want you to have this side of it so you can stay organized.

[00:39:13] And like I said, I will have a special bonus for you guys with this Trello board. That is the exact process of lead gen that we use. I'll make sure you guys have that so that, you know, you have a jumpstart and you don't have to create anything from scratch. And I'll make sure that we get that to you. Uh, in the next couple of days.

[00:39:30] And like I said, I'm using it, use it, make it a part of your life with clients. Yeah. Make sure the client sees that you're that organized. It's going to be a big thing, but using this stuff, you'll get a client where they need to be. My goal with every client is to get them all the way to here, which is fully onboarded having all of the 42 steps checked.

[00:39:53] And if I get them here and they've been growing along the way, becoming more educated, they've been understanding what they need to do on their side as we check in every week. And. Also, we're getting better results because we're dialing the ads in. By the time you get them here, they're yours, they're yours.

[00:40:11] They're not going anywhere because they're getting real results. If you don't do this stuff, you're not nurturing that relationship correctly. You're not educating them correctly. And they're going to be a client that you're always worried about losing. Does everybody understand the difference between a client that's over here versus a client?

[00:40:29] That's all the way back here.

[00:40:37] Good.

[00:40:41] Good. All right. Cool. Cool. Um, what I'll do for you guys is not only will I give you the meat roots board when I do it, but I'll also give you this one. So I'll have both of these, so you can see two different services, uh, that we do that you have two different boards. They're very similar. They're very similar, but I'll make sure you have two different services, so you can see sort of what the boards look like.

[00:41:04] And I think with two different angles on this, uh, everybody will be able to understand how to best use this and how to rock it out, um, and do all the things that you need to do. And that's, that's my goal is making sure that I am so tired of people just covering the shiny stuff, but not covering this stuff.

[00:41:24] This is the stuff. That you have to understand. If you don't understand this, you can't actually run the business. And if you can't run the business, yeah. Robin says it looks like the calendar functions not available in the free Trello account. I would upgrade to get the calendar then. Um, I didn't know that, but the calendar function is definitely something that yeah.

[00:41:45] You'll want to have. And it's super powerful and yeah. Okay. It's 10 bucks a month, um, to do that, I think it's going to be a good 10 bucks that you spend day, but, and you're good. Okay. Alright. So let's see, where did the, you go over the followup calls, David posted the group specifically what you want to know about the all calls.

[00:42:06] Give me a list of things that you're sort of shaky on and I'll make sure that we, uh, we talk about those things. Okay, buddy, if not in a training, I'll get you answered stuff in there. What I look for David is it's like when you guys ask a question, what is something that needs to have a full training on it?

[00:42:22] It's important right now versus what are the things that we need to do? Um, Later on. Does that make sense? Does that make sense? Good. So keep, keep asking. Will you post your question specifically? If I can answer them in there, buddy? I will. If not, we'll do a full training session on followups. I think that's probably covered now the road anyway.

[00:42:44] Cause I think it's important, but I do have a couple more funnels that I want to sneak in for you guys in the next couple of weeks that I think are super duper important and I want to make sure I get those in there. Cool. Okay. Cool. We got done in an hour today. I hope everybody was happy. Was this a good trading?

[00:43:02] Does everybody see the value in why we did this now? How you can integrate this into your life and how this makes you a more complete agency? Like I said, it's not complicated. It's one of those things that once you see it, you're like I get it. It makes absolute sense. This is wonderful, but it's, it's something that when I give you this.

[00:43:21] What should happen is you should feel like there's a weight off your shoulders because. Because you don't have to keep this information in your head or on post it notes or out a spreadsheet. That's hard. This helps you see your entire business in terms of clients that have signed up. This helps you keep your entire business in a dashboard view.

[00:43:41] It's really, really powerful. So what we're going to do is we're going to get this replay up in probably the next 24 hours. So it'll be on those sites. You'll have a link inside the software. Of course, if you click on the little bell, um, I'll get the pizza money stuff that the SMS board to you right away.

[00:43:57] It'll take me a couple extra days for the root stuff. Cause I'm guys. Full disclosure. I am swamped right now with this crazy launch. Um, I had forgotten what it was like to launch on a place like warrior. Plus, how many of you are laughing at me right now? Because you think it's funny that I and block and I, and I've got a whole story to tell you about all of that.

[00:44:19] Um, but I'm swamped this week, but I'm not so swamped that I was gonna miss this. I wanted to make sure that you guys understood this. Um, because this is so powerful and it's, I'm not, I'm not, so, yeah. Yeah. So, like I said, you'll probably have to upgrade for the calendar. Okay. Oh, okay. Rob. Gotcha. Gotcha. So anyways, ball gave me a series.

[00:44:42] This is. I'm never gonna miss time with you guys. No matter how busy I am. Number one, because you all, we are part of a movement. We are getting momentum. Businesses need us. They absolutely need us, but I, I had to push back this week's funnel because this was more important than covering the funnel that we were going to be doing.

[00:45:03] Okay. Uh, this pizza money going to be added to the regular SPS library. It seems to you about separate now. Probably not. Um, Probably not at least for a while, maybe in the future. I don't know. I would love for it to be more accessible for you guys, but like, Roger, we're still feeling our way out with how all that worked.

[00:45:23] Um, but yeah, anyways, this week, do me a favor, reach out to more leads, follow up with the leads you've got when you run into trouble and you don't know how to do something. Getting that group tag, Tabitha tag, Alicia tag, Ashton. Tag Amy tag, all of us and ask for help on what you're running into. We can't help you if we don't know what you're running into, you can't run into it unless you're actually out there doing it and rocking it.

[00:45:52] And I am committed to you. I want you to know I'm burning the boats behind me. I am a hundred percent committed to you, and I want you all to understand how important it is that we continue to move forward. With what we are doing with what we're doing. You guys want to see something cool. Alicia, can I show this by the way?

[00:46:15] Can I show this? Are you okay with me showing this to everybody? I didn't know if this was for public consumption or

[00:46:30] I'm waiting for Alicia. Tell me yes or no. What Alicia is doing right now. Is Alicia is looking at this and saying, what have, what is possible? That is too much to show, but I want to, uh, I'm getting no answers. So that means that either Alicia left the room or, um, she's, she's like definitely being like, ah, I don't know if I want to, I'll give you guys a real quick, um, a real quick overview of, you know, just how we do so real quick peek.

[00:47:01] Alicia, is this okay? Did we lose Alicia? Asher? I'm not sure.

[00:47:09] So I'm not getting yet. Okay. There it is. There's there's a reply, Alicia, can we show people this, uh, this board she's she's answering me now. You can hear the clicking in the background. Probably. Can we show them just a real quick view of the sport? I won't go in depth because I know there's some private stuff, private stuff on here, but can everybody see the board on your screen right now?

[00:47:29] I just want you all to understand that we use the crap. Out of Trello to stay organized and to keep a top level view of the things that are important to us. And so it's not just in just business, but like Alicia has this board set up for a lot of really interesting things that she wants to keep track of all the way through.

[00:47:50] I don't have a personally shot. You're killing me. You're killing me. Like everybody's got a cool person, but I'm kidding by the way. Um, I'm given Alicia said she's not done. So anyways, I just want you guys to understand stand that this is definitely a way that we stay organized. We've been using this for years.

[00:48:08] I get a little bit better at it. Every time I get in there and start building new things, you guys are gonna have this, this setup. We're going to make sure you guys are good to go look out for this replay tomorrow. And as I said, I'll get us a meat reus specific business system. Board that's like this, uh, to you guys in a few days, so you can add it to yours.

[00:48:26] You can go from there and we're good to go. So I want to, uh, sure. We got that. Elisha also helped me remember, I gotta get shirt, order forms out to some people in the group that were completed rainmakers so we can get that taken care of and, uh, we're on it. All right. I love you guys. Be good. Have a good rest of the week.

[00:48:44] Uh, anything you guys have go post in the group, make sure you tag us. We'll get you taken care of. Go follow up with those leads. I want to see you guys getting meetings set up. I want to see deals closed. I want you all to run into trouble because you're moving so fast and I want to help you get out of that trouble.

[00:49:02] Let's do it. All right. That's the thing let's get in there. Let's get into trouble because you guys are moving so damn fast and you're getting paid. If you can get that part done, I'll help you get results. Don't worry about that. Get in there and rock it out. Let's get into some good trouble together.

[00:49:18] Alright, I love y'all be good. I will see you next week for our regularly scheduled fuddle stuff. And then, uh, like I said, you let me know what else you need, and we're gonna schedule some more trainings in the next two months. They're going to help you get through all of the things that you need to get through.

[00:49:32] And we will continue to cover the most important stuff so that you guys actually have what you need. Not this, not just the shiny stuff, but you guys actually have what you need to blow this stuff up and really rock it. Alright. Be good. Take care of yourself. I'll talk to you soon.