New vCita Client Onboarding

A quick guide by vCita Partnerships Team

About this guide

- This guide was designed for vCita partners that would like to train and on-board their clients on how to work with their vCita account.
- This document offers a scripted onboarding guide including:
  1. A short intro about each screen/module in the system. This will help to reduce the user's objections, and concerns in adopting new technology.
  2. Basic configuration setup based on the business needs.
  3. Notes and instructions for the representative marked in red.
  4. Guided walk-though on the day-to-day work with vCita CRM.
- Once you are familiar with the onboarding flow and screens, you can use the Onboarding Check List as possible points to cover during the onboarding.
- Once you completed an onboarding session with a user, we recommend to set a follow up session, to allow the them to ask additional questions after experimenting with the system and to ensure full adoption of the service.

Before you start, we recommend that you will:

- Use your own vCita account to schedule the onboarding session with the new vCita user.
  Make sure to enable SMS confirmation and reminders. It will help you to demonstrate the benefits of the service and it is a great reference during the onboarding session.
- We recommend that the LiveSite widget will already be installed on the user's website.
- Use screen-share or remote control session and work on the user's vCita account.
- Take advantage of the onboarding session to fine-tune the account settings to match the business specific needs.

Onboarding script for vCita Business subscribers

Intro:

Prior to the appointment, access the business client portal and leave a message to the business as a potential client. This will allow you to demonstrate the process of how to handle new leads in the system.
(Login to the account and navigate to My LiveSite> click on 'View'> click the **leave a message** option and send a test message to the business)

"Hello <user's name> my name is <rep's name> from <company>.

This call was scheduled to get you familiar with our business management and client engagement tool.

During this session, I will show you around the system, help you to set up your account specifically to your needs, and show you how to make the most of the service.

To better understand your needs and to get you better set up, please tell me a bit about your business and your clients.

Other possible questions:

What type of relationship do you have with your clients (one touch/ongoing)?
What type of services do you offer?
How do you communicate with your clients (email/phone/other)?"

Listen to the user's response and pain points, it will help you to decide which sections in the system you should cover first to answer their urgent needs.

Below is an example of a common flow – the business is looking for a tool to manage clients and leads, to be able to follow up effectively,

Thank you for that information. Let's start and see how the system can help you with your daily interaction with clients.

Let's login to your account. Go to https://app.vcita.com/app/login Or if you have a white label account provide the url to your white label login page.

We recommend to create a shortcut to the login page on the user's desktop or add to their browser favorites.

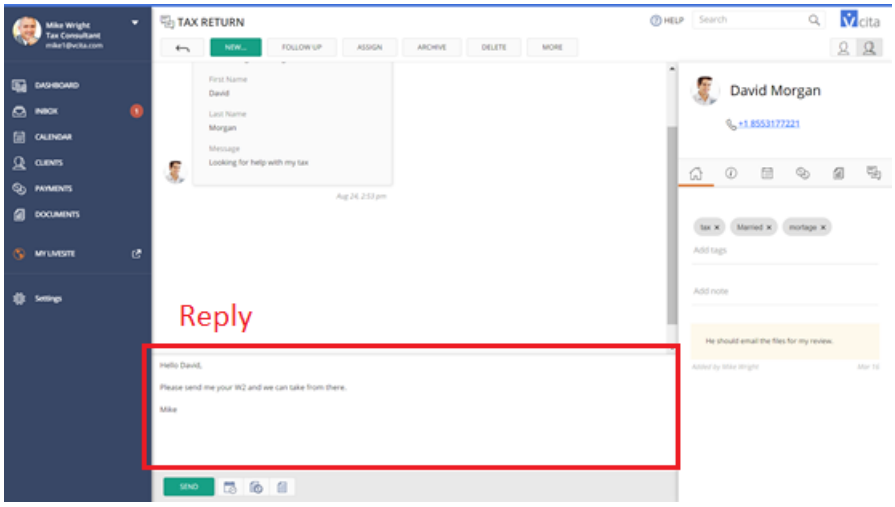
Inbox Overview:

Great, we're logged in. Let's start with the Inbox.
The Inbox is very simple and intuitive. A lot like what you already know from your email inbox.

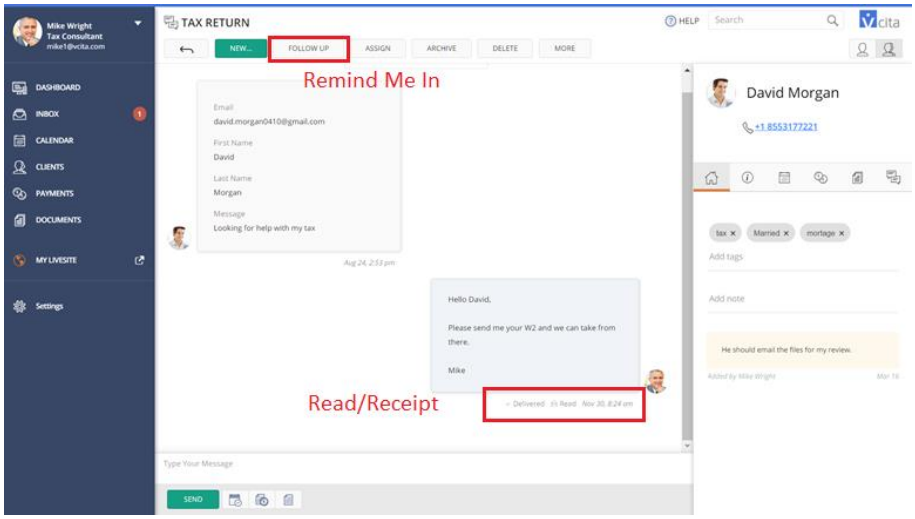
This is your main work screen. Whenever clients contact you, their requests will be listed in the Inbox. Here you can see a test message I sent you prior to our call.

With a click, you can see the content of the client's request.
Click on the message line in the Inbox to show the content of the request.
The click the **Info** tab on the client card on the right-side pane.
Note on the right, when you click on the **Info** icon, you can see the client's contact info.
The information you see here is what the client provided when they contacted you. You can edit the information as needed or add new information you learn about your client.

Click on the **Home** icon, to add private notes to yourself. You can use this option to document the conversation you have with the client. Or to add your next steps.
Please let me know if you have any questions so far.



Now let's see how you can respond to the client - simply click on the **Reply** field and type your message. The reason you should always reply from the Inbox, is that it will allow you to see if the client received and read your message.



Now, let's say that you want to follow up with the client within a couple of days. You can click on the **Remind me in** button and set a reminder to yourself to call the client. You can even add a short note so you will know what the follow up is about.
When the time to follow up with the client comes, the system will notify you!

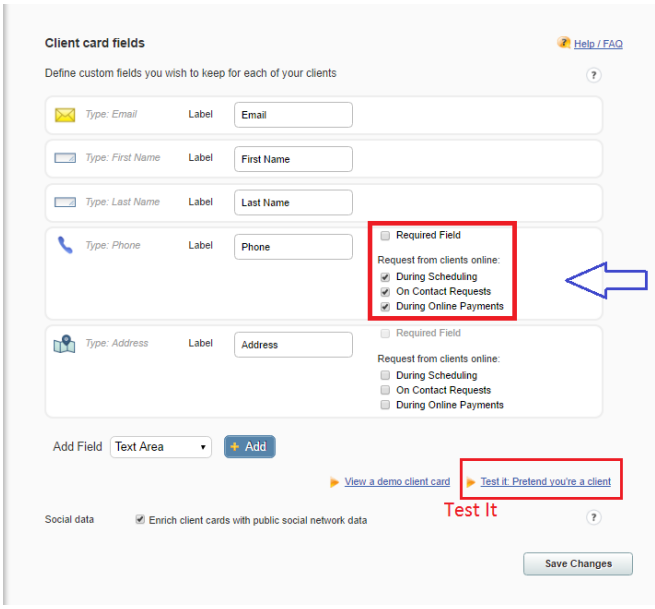
Configuration – Customize the client card

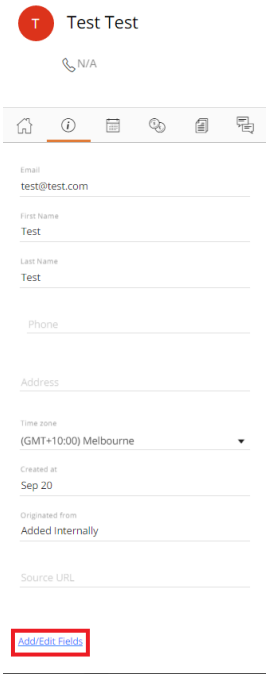
Now that we saw what you can do with the Inbox, let's go over some settings to make sure everything is set up to your needs.

Let's go back to the **Client Card** tab (the Info icon) on the right. As you can see we collect some basic information like the client's name, email phone number and more. But if you wish to collect or save more information you can add more fields. Let's scroll down the client card fields until we see the **Add/Edit link** and click on it – Here on the **Client Card Settings page** you can add more fields to the client card.

You can add any field, and for each field you can choose if you wish to use it internally, meaning you can manually complete this information yourself in the client card.
Or, you can check the **During scheduling/On Contact request** boxes, and then the client will have the option to enter this info when they first contact you. You can also make those fields required.

Are there any additional fields you would like to add?
It can be a free text field or you can allow the client to choose an option from a drop-down menu.
Listen to the user's answer and show them how you add a new field.





Great, now that we are done adding the fields, I will click here on **Test it** to show you how the form looks like when your clients contact you online.

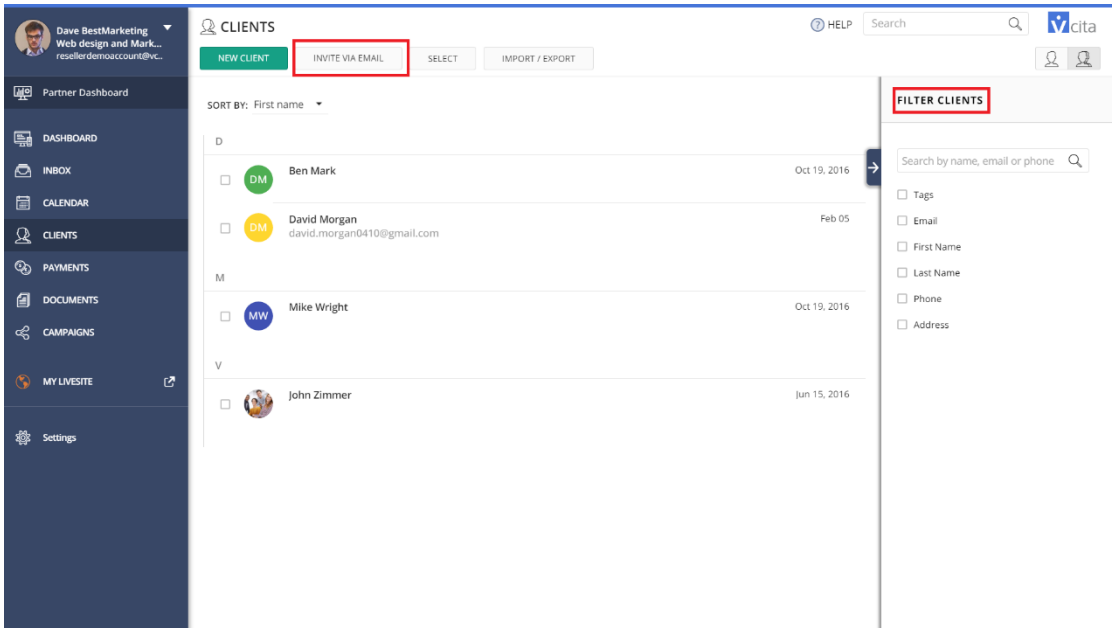
Clients Overview

Now, we can click on the Clients menu here on the left. Here you can see a list of all your clients. Anyone that ever contacted on through the LiveSite page or forms or if you created or imported them yourself.

Here you can search any client based on their name email or phone. Or you can filter clients based on different parameters including tags (tags also will use you on Campaign section – Very Important).

It is very useful if for example you wish to send a message to multiple clients.

Let's say that you filter all the clients that has a tag "interested" (or anything else). Once the list will be displayed, you can click on Select>All and then Invite Via Email and send an invitation to those clients, to contact, schedule a meeting with you or visit your LiveSite page and more.



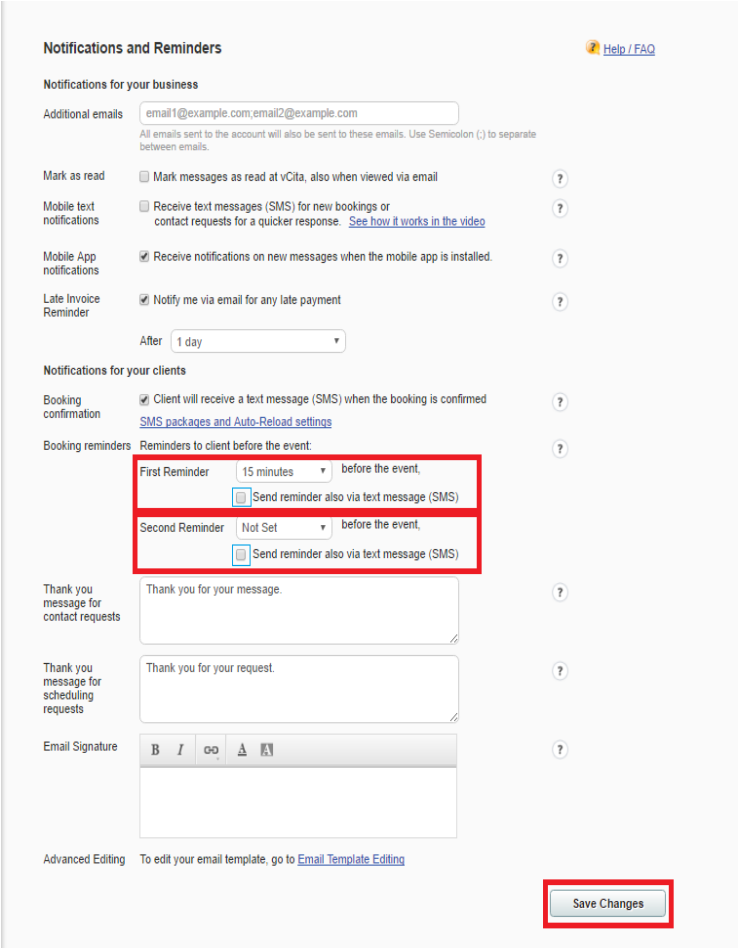
Do you have any questions?

Let's continue.

Calendar Overview

Let's click on the **Calendar** menu on the left.
Here we have a calendar that you can use to schedule all your appointments, and it can even sync with your current calendar. We advise you to start scheduling all your appointments from here for a few reasons: First, your clients will receive a meeting confirmation by email or SMS once the appointment is scheduled, and it will be added to their calendar.
And second, they will receive a meeting reminder. If you used vCita to schedule the onboarding session with the user, and the user received SMS confirmation and reminders, you can say the following:
I wanted to ask you – do you remember if you received an SMS reminder about our appointment? You did? Isn't it great? You can also have it! Let's enable SMS reminders on your account to be sent to your clients. It helps reducing "no show" rate in about 70%!

Configuration – SMS reminders and other notifications

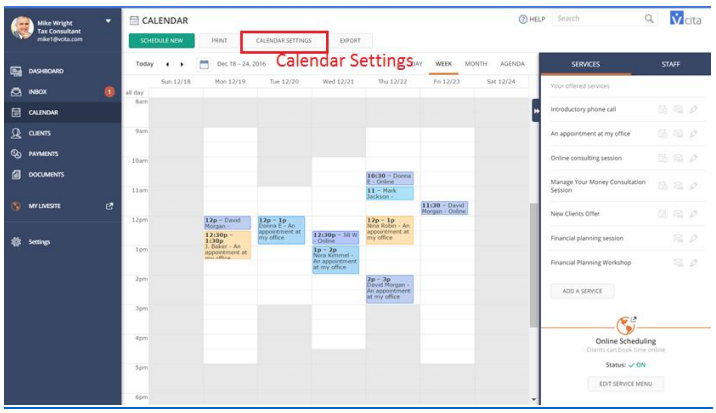


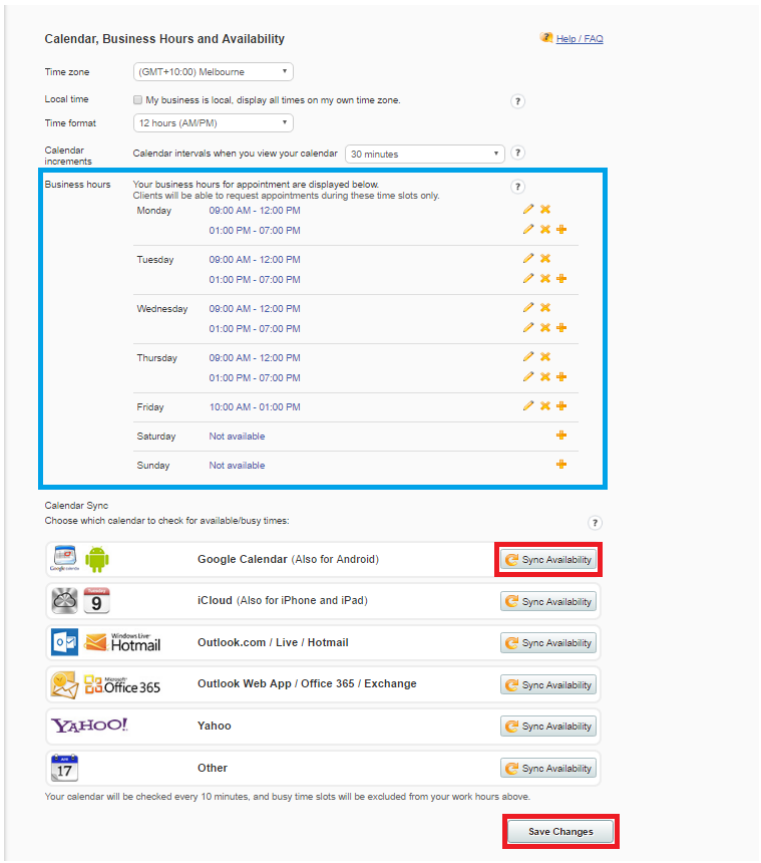
Go to Settings> Reminders & Notifications. Check the **SMS reminder** option.

When would you like the first reminder to go out? (don't wait for the answer) I recommend 1 day before the appointment and the second reminder, an hour before? OK?
NOTE: Remember to save changes

Great we've turned on SMS reminders on your account, let's go back to the **calendar** and further review the options you have there Go back to **Calendar** menu on the left.

Working with the calendar is very simple, again it's like what you know from other calendars.
Do you work with a calendar today? If answer is yes and us using a web based calendar like Google/iCloud/OWA/Office365 - Great, then you can sync your current calendar to this one, so you will be able to see your "free/busy" times so you will not accidently double book yourself. Let's quickly sync your calendar: I'll click on **Calendar Settings** at the top. (If the user do not want to sync at this point click here to skip this step).





On the calendar settings page, you can easily set your business hours by default it is 9 to 5 but you can customize it (This will be useful later when you want to discuss the online scheduling option).

Now, let's sync your calendar. Which calendar are you using? Great so let's click on **Sync Availability** next to it and we will see the sync instructions for your specific calendar.

Complete the sync

NOTE: Do not forget to save changes.

Great, let's go back to calendar screen. Now you can see your up to date availability and you are ready to schedule with clients.

Again, I remind you that from now on, it is very important that you'll schedule all your appointment from this calendar, so your clients will be notified and reminded about your appointment, and that you will have tracking of all the appointments you had with each client.

Let's schedule a new meeting, all you need to do is click on an available spot, select "**appointment**" and choose the client from your list which you want to schedule with.

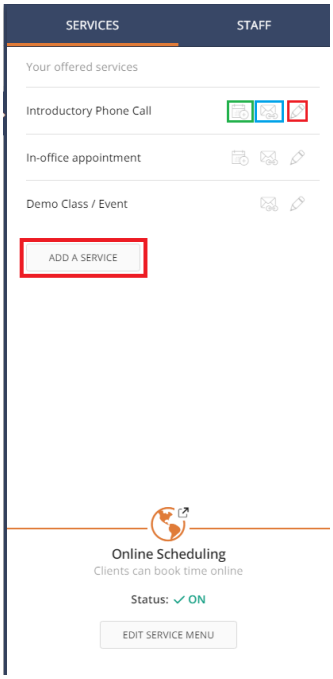
Now, if you have some specific meetings that you tend to schedule often or specific services that you provide, you can save them as templates, and use them next time you want to schedule with a client. It will save you time. We'll see in a second how to configure those services but let's just complete scheduling this meeting.

So, we selected the client, and how we can select a service from the list like "phone call". Adjust the time if needed. All the other meeting configuration like the duration, how the meeting will take place and more will be auto-populated based on the service we set up. Of course, you can review and adjust it per meeting as needed. Click on send and that's it. The meeting is schedule and the client received the notification.

Configuration – set up a new service

So, as I mentioned, if there are specific services that you offer to your clients or schedule often, you can create them once in the system and then reuse them.

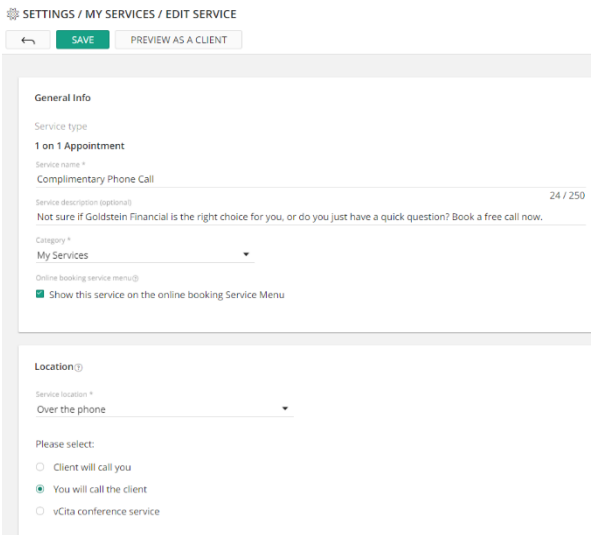
As you can see on the right pane here, there are already some predefined meeting templates. Let's edit one of them and customize it to your needs.



Click on the Edit option marked in red on the image.

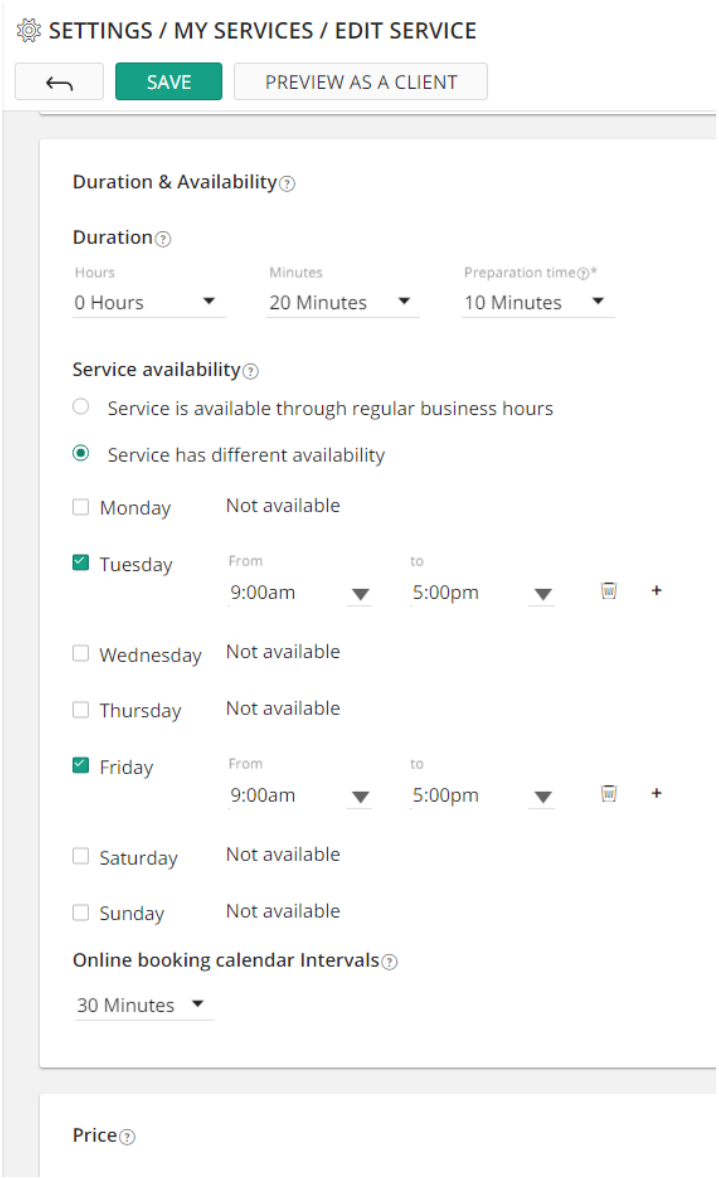
(The icon marked in blue will display a link you can copy and send to clients and allow them to schedule with the business online.

The icon marked in green will allow the business to schedule the specific service with a client.)



Is there a specific appointment that you tend to schedule often? Can you give me an example of a service or a meeting that you offer? Type the response in the service name fields.

Are you going to meet with the client over the phone? I suggest that you call the client for the appointment. Update that option under Location



Who long do you want the meeting to be? Do you need block time for setup before the meeting?

Complete the settings based on the user's response.
Only if the user is asking, review all the other options like Price, Intervals, Service availability and Client fields.
Once the user understands the service configuration, and if they ask, help them to create another one or two services, and tell them that they can add more as they wish.
Ask the user if they would like to allow their clients to schedule this service online.
If yes, check the appropriate box and continue to show the LiveSite on the website.

NOTE: Do not forget to save your changes.

Campaigns Overview

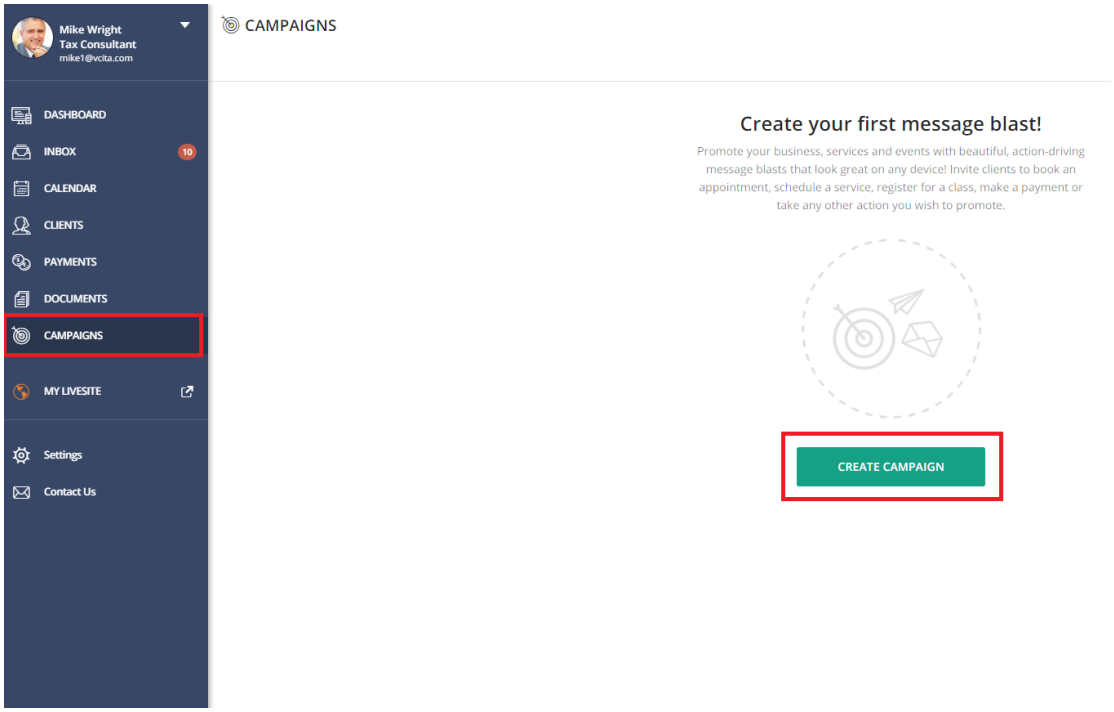
Let's click on the Campaigns menu on the left.

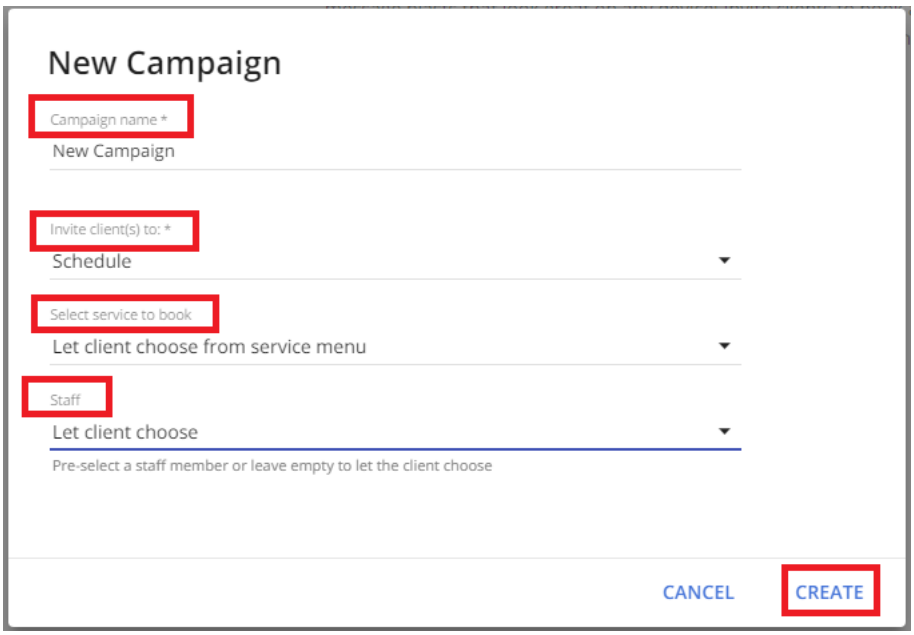
Campaigns are an effective tool to promote your offered services, driving more business and revenue from clients. You can use campaigns to target existing clients or new prospects, inviting them to book an appointment, register for a class, make a payment and more. The campaigns are all about getting clients to interact with your business, and that's why they are built around a specific call-to-action (book/schedule/pay etc).

Creating and sending a campaign is simple and quick, and you can even do it while on-the-go from your mobile device. You will also be able to track campaign results in real time, including delivery stats and client actions. No design skills are necessary - you can easily create and send beautiful, mobile-friendly emails that will engage your clients and increase your revenue.

Let's create our first campaign! First, we should ask ourselves: what is our message? Who is our audience? What is the main call to action? We want to hear from the client what they are looking for in the campaign.

Creating New Campaign:
Click on left navigation pane, click on Campaigns and then click on Create campaign.

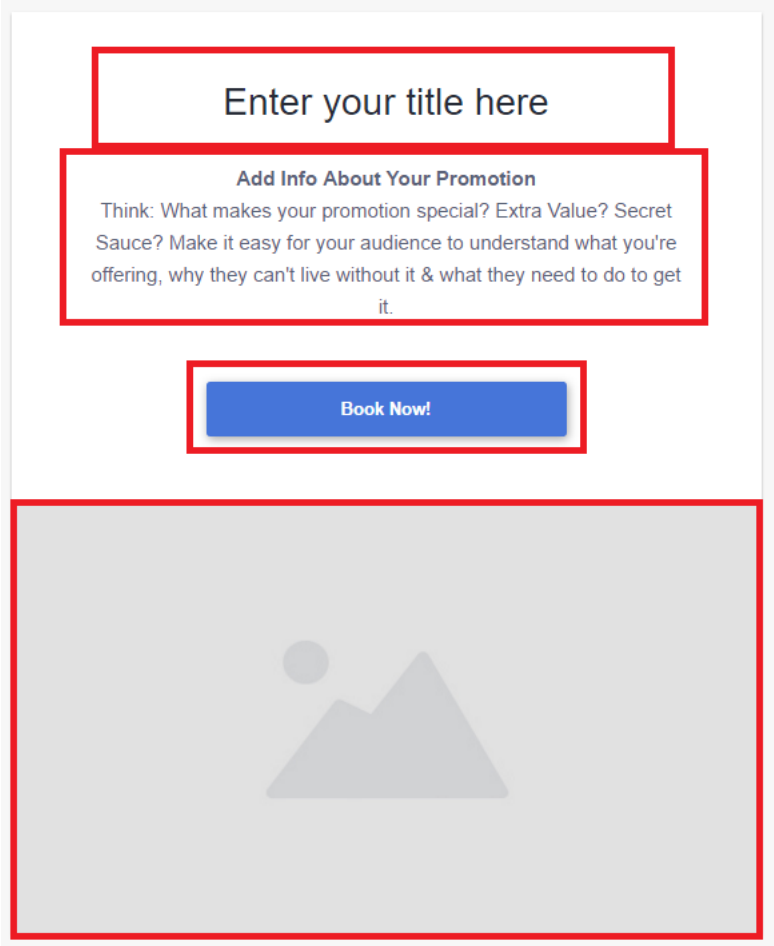




Next, complete the fields on the new campaign form as needed. (Wait until they finish).

When you finish, click on **Create**.

Email Template:



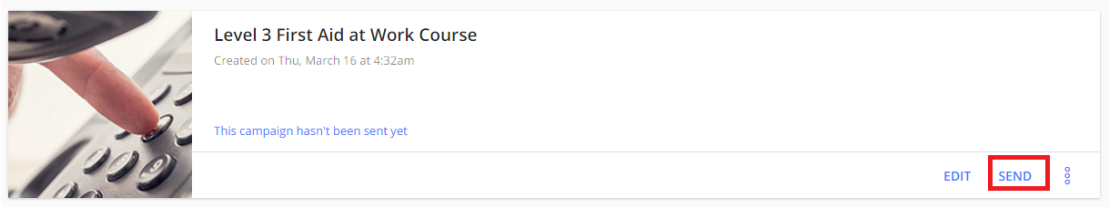
Like we said before, no design skills are necessary.

We enter the Email content, action button text and choose image from library or the computer.

When you're happy with the result, click on **Done** button (green button at the top of the page).

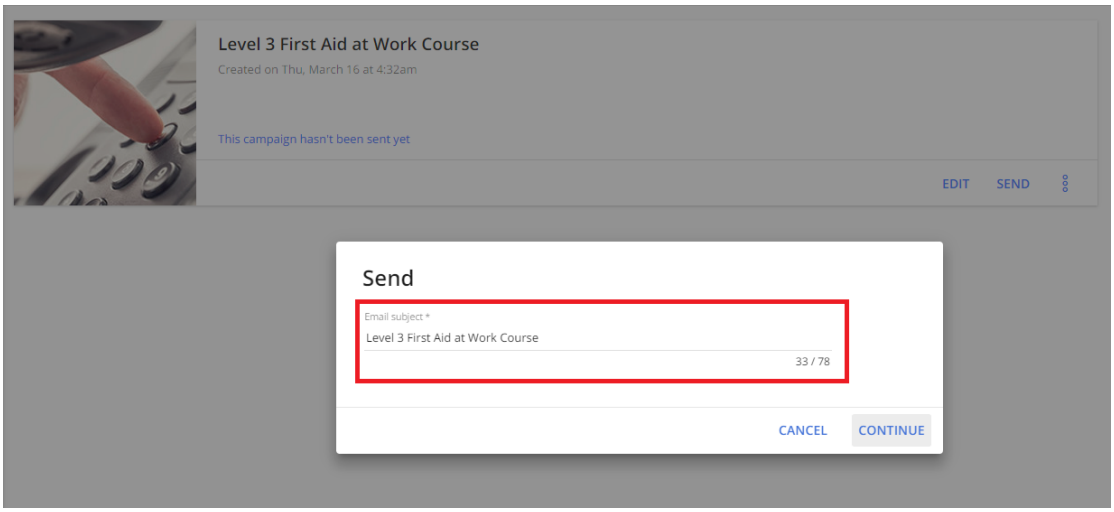
Send:

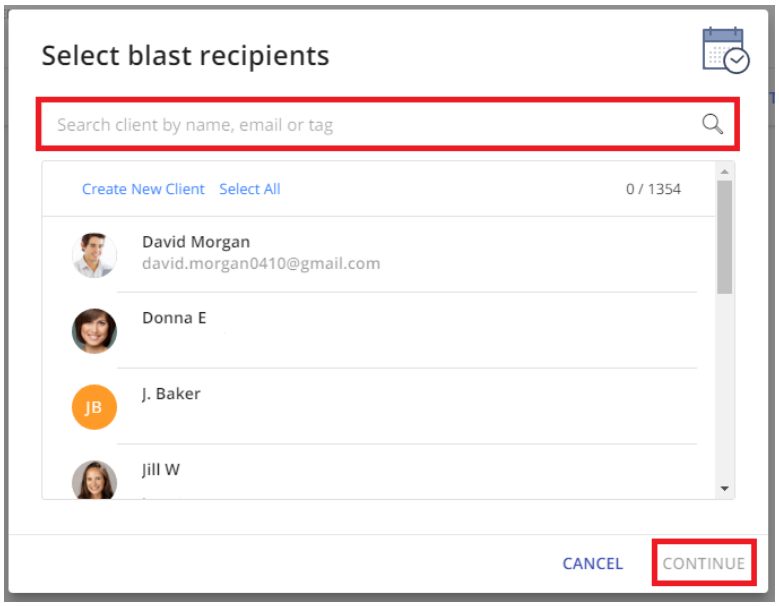
After you created your first campaign, click the **Send** button to select your mailing group.



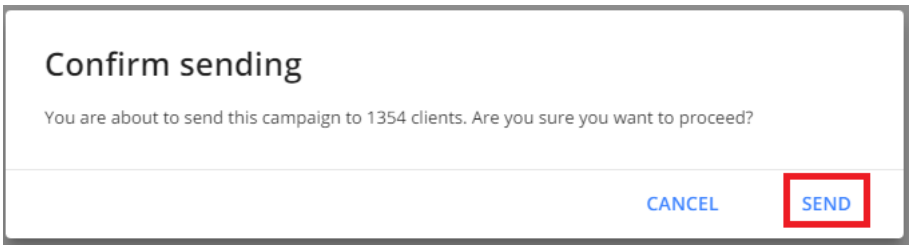
Enter the email subject as the client will see in their email Inbox.

Then click on **Continue**.





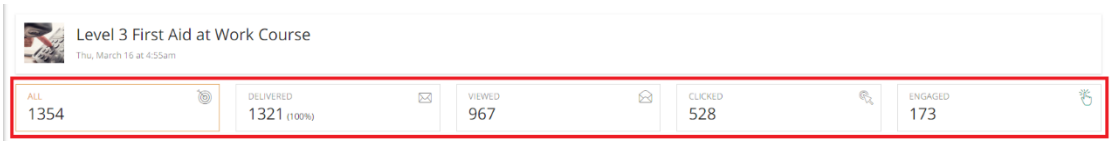
The next screen is asking you to select blast recipients (you can search a specific client, filter by tag or select all). Then click on **Continue**.



Are you sure? Let's do it!

Stats:

After the campaign was sent, you can see the campaign statistics.



By clicking on 'view stats' you can choose data fields, click on data field and you will receive list of details about the field.

If you'd like to send again the campaign click on **Send**.

Any questions?

Great.

There are many other great options in the system for example, you can send invoices to your clients and track payments. Or you can share documents. Would you like to continue?

If yes: Great! Let's continue to the "Payments" tab (click here to skip to payments).

If no: That's not a problem, we can schedule another session later.
(leave the client with something they can do themselves)

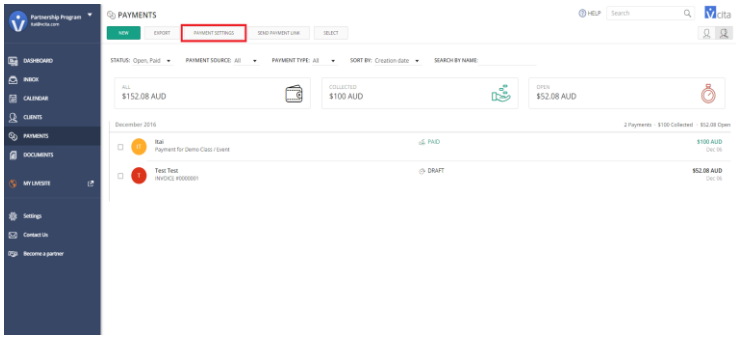
Leave the user with some tasks that will encourage them to further explore the system

- Sync the calendar if it wasn't completed.
- Download the APP (If using vCita brand)
- Import existing clients to the system and send them an invitation to visit the user's LiveSite page.

Payments Overview

Let's click on the Payments menu on the left.

On this section, you can send invoices to your clients and track client payments.



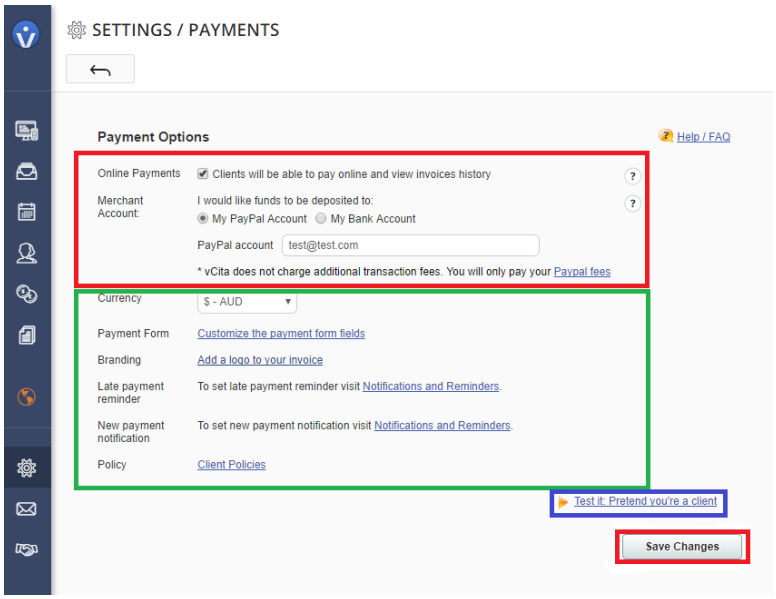
Do you have a PayPal or Stripe account? Would you like let your clients to pay you online?

If no: explain about sending invoices and about payments tracking (click here to skip online payments):

Yes? Great. Let's click on the **Payment settings** button here at the top of the payments screen.

Configuration - Payments

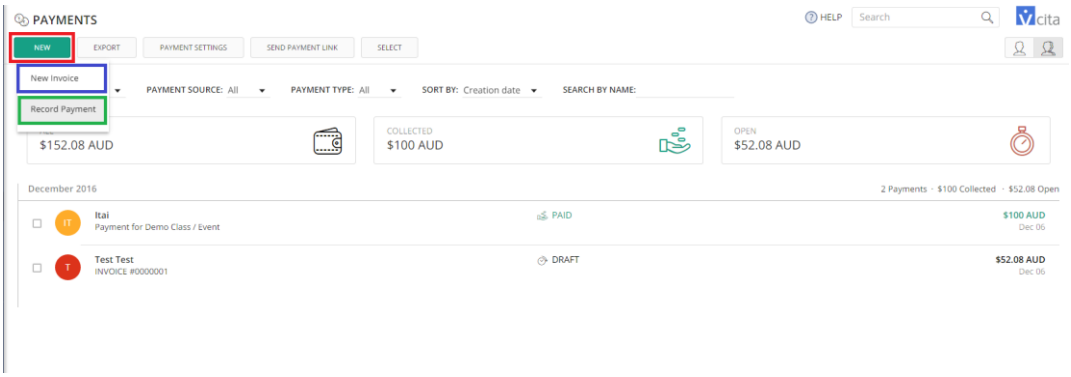
First let's check the box next to **Online Payment** option. It means that when your clients receive an Invoice they can pay for it online using Credit Card or with their PayPal account. You can choose if you wish the fund to go to your PayPal account or to your bank account using Stripe.



When you enable online payment option, your clients can also pay for your services if you have enabled also online scheduling.

Mark the user's selection and connect their merchant account (PayPal/Stripe). If needed update the currency.

Save changes.



Let's go back to **Payments** screen

1. You can click on **New** to create a new invoice. You can choose a client from your list or create a new client the fly. The client will receive the invoice by email.
2. Another option you have here is **Record payment** – this allows you to track your revenue. For example, if a client paid for a service offline for example, paid cash or check, you can simply add a new payment line, note the amount and how it was paid.

Do you have any questions regarding payments?

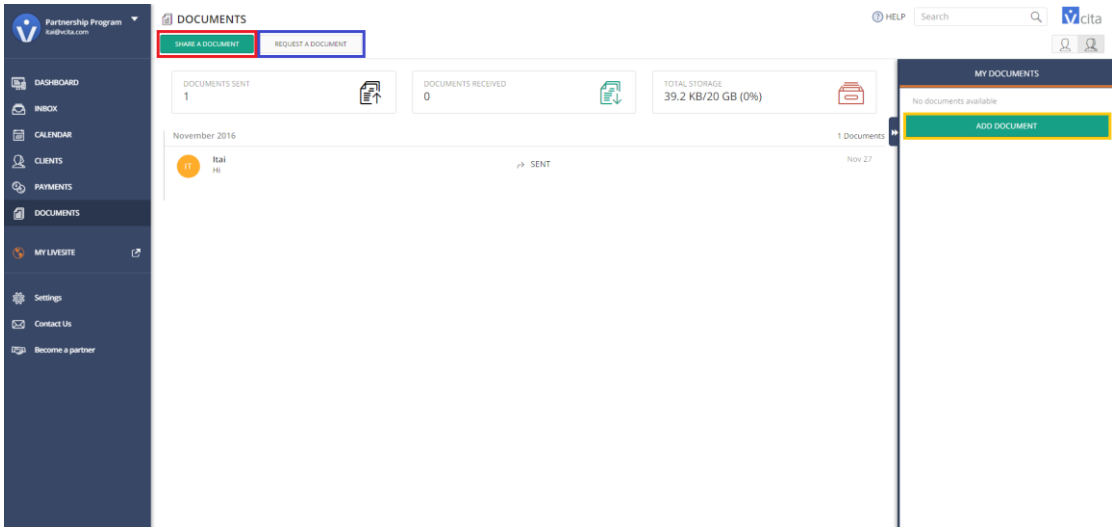
Now we can take a quick look on the documents section.

Overview Documents

On the documents screen, you have two options:

You can click on **Share a document** and send a document to a client. For example, you can send your clients an intake form, contracts, guides or photos.

Or you can click on **Request a document** and send your client an invitation to share a document with you.



On the right-side pane, you can upload documents that you commonly share with your clients. It is like a document library.

Do you have any questions for me? Anything else you wish to review?

If you will have any questions in the future, feel free to schedule with me. We can schedule another session to look at some more options.

I will send you a handbook which covers everything we talked about.
Use vCita to send the document. It is a great way to demonstrate the documents feature.

Onboarding Check List:

LiveSite Page setup (It is recommended to complete the LiveSite page setup before the onboarding session):
My LiveSite>Edit LiveSite Page

1. Business profile
2. Action buttons – according the business clients, what actions they need to take
3. Theme – Basic, only color and background photo. Use logo colors
4. Contact info – setup business info and social channels

Inbox:

1. Overview
2. Main Inbox Actions
    - Quick response
    - Client info view & update
    - Private note
    - Tags
    - Remind Me In
3. Initiate new client interactions – Invite Via Email

Clients:

1. Overview
2. Search and filter
3. Invite Via Email
4. Import/export clients

Calendar:

1. Overview.
2. Services – edit/create and utilize
3. Sync with your existing calendar
4. Online scheduling options – enable online scheduling for clients
5. SMS appointment reminders to clients

Campaigns:

1. Overview
2. Create campaign
3. Email template
4. Send
5. Analytics

Payments:

1. Overview.
2. Payments settings – enable online, connect merchant account, set currency.
3. Payment tab – issue new invoices, tracking payments.

4. Send payments link & payment form

Documents:

1. Overview.
2. Share documents.
3. Request documents.
4. My documents library.