

## ECOMOB-01 eCom Process Onboarding Checklist Rev.1

This **Onboarding Checklist** is designed as a simple to-do list to effectively instruct eCom Process customers who have purchased the system in how to effectively use and succeed in implementing the system.

- Pre-Meeting Set-up
- Meeting
- Legalities
- Onboarding
- Q&A

### 1. PRE-MEETING SET-UP

**Overview.** After the customer has purchased the system then we are to send them an email to invite them to join an on-boarding session.

- Copy important information into [ECOMOB-01 eCom Process On-boarding Spreadsheet Rev.0](#) If you have not been invited to the spreadsheet then ask your supervisor to add you.
  - Full Name
  - Email Address
  - Phone Number
  - Skype Contact
- Send the following email template to the client:
  - You may need to ask your supervisor for the Log-in information found in this email.

#### EMAIL #1a

**SUBJECT:** eCom Process On-boarding and Important Information

Hi [NAME],

Thank-you for your purchase of our eCom Process system. The next step in the process is for you or an Administrator of your choice to undergo an On-boarding meeting. You can feel free to bring as many people to the meeting as you feel is required.

In this meeting we will be covering many topics to help make you and our system the best they can be. This meeting brings you a step closer to Certification under our program.

At your earliest convenience please chose a time to hold the meeting by clicking the link below:

Choose the 3-hour option: [BOOK A MEETING](#)

Once the meeting has been booked, You will receive a Zoom meeting link.



## ECOMOB-01 eCom Process Onboarding Checklist Rev.1

Your System Admin Log-in is:

<https://ecomprocess.com/wp-login.php?>

**UN: Zonversion**

**EM: kevin@zonversion.com**

**PW: stpMuy1vq((VTq@65\*\*b(R**

Feel free to look around prior to the meeting. **NOTE:** To start, the task management software password for the admin account can be found in the “Accounts” page under the “Kanboard List” heading. **IT IS NOT THE SAME PASSWORD AS NOTED ABOVE.**

I can't wait to chat and get you moving along. See you there!

**EMAIL #1b**

**ATTACHMENT LINK:**

**SUBJECT:** eCom Process On-boarding and Important Information

Hi \*|FNAME|\*

Thank-you for your purchase of our eCom Process system. The next step in the process is for you or an Administrator of your choice to undergo an On-boarding meeting. You can feel free to bring as many people to the meeting as you feel is required.

In this meeting we will be covering many topics to help make you and our system the best they can be. Attached is an Itinerary and instructions on what is required prior to the meeting starting. Some of these tasks are optional, but we feel they can ultimately be very helpful in your company's success. Please See Attachment.

At your earliest convenience please chose a time to hold the meeting by clicking the link below:

Choose the 3-hour option: [BOOK A MEETING](#)

Once the meeting has been booked then we will meet at the following meeting room:

[MEETING ROOM](#)

Your System Admin Log-in is:

UN: (Insert Correct Info)

EM: (Insert Correct Info)

PW: (Insert Correct Info)

Feel free to look around prior to the meeting. NOTE: To start, the task management software password for the admin account can be found in the "Accounts" page under the "Kanboard List" heading. IT IS NOT THE SAME PASSWORD AS NOTED ABOVE.

I can't wait to chat and get you moving along. See you there!

Best Regards,

**[Signature]**

- **Once the Client has booked the On-boarding meeting** then send the following email (1) hour prior to the meeting starting, to the client as a "FWD" Forwarded email of the original above email.
  - Forward "**Email #1**" shown above.
  - This brings the original email contents to the top of the clients.
  - Be sure to re-enter the clients email address in the address bar when you forward it. This will NOT be done automatically.

## EMAIL #2

Hi \*|FNAME|\*

I just wanted to contact you and let you know that I saw that you booked an On-Boarding meeting. I can't wait to have a chat with you. Please see the previous email below for meeting details. It is recommended that you are at a PC and not on a cell phone since I will be sharing my screen with you and you will be making major modifications on your end. This is to make sure you get the best view possible!

Below is the link to our meeting room.

[MEETING ROOM](#)

**If you find you have an issue with the link above, then I can always be contacted on Skype using >> reed.menssa1 << as the contact name.**

## 2. MEETING

**Overview.** Start the meeting and go over these steps

**MeetZippy**

## ECOMOB-01 eCom Process Onboarding Checklist Rev.1

- Be in MeetZippy (10) minutes before the meeting starts and be familiar with the program functionality.
- Record conversation (This is 100% required) the meeting is not to move forward without this happening.
- Go into [ECOMOB-01 eCom Process On-boarding Spreadsheet Rev.0](#) and note the company information and name of the client.
- Continue with the rest of the onboarding meeting found in ([3. Legalities](#))

**Skype (To be used as a 2<sup>nd</sup> option if the Meetzippy option does not work)**

- Record conversation (This is 100% required) the meeting is not to move forward without this happening.
- Be in Skype (10) minutes before the meeting starts.
- Go into [ECOMOB-01 eCom Process On-boarding Spreadsheet Rev.0](#) and find the skype contact of the client.
- Add client contact into skype and request contact permission. Use note stating:

**Hello there, this is [YOUR NAME] with eCom Process. Please accept my invitation so we can go over our system onboarding instructions.**

- When the meeting time arrives, message the client to see if they are ready. When you receive a reply then call the client.

**3. LEGALITIES**

**Overview.** Explain the legalities of the system.

- Go over legal responsibilities using the following script:
  - I would like to first start, by saying that this conversation is being recorded for quality assurance purposes as per our QAREC-01 Quality Assurance Recording Procedure.**
  - The first portion of this onboarding meeting will deal with the legalities of your purchase as well as our commitments to you. There will be no sharing or resale of any of the contents of this system. We have taken steps to watermark and electronically tag the processes, checklists, video's and images. Any instance of not following this portion of the TOS will be dealt with on a case by case basis. You are allowed with your purchased license to share these documents with any of your company's team and any sub-contractors that have been loaded into the system as a user. At no time will you be allowed to share/sell or authorize the use of these systems outside of your company. At this time it is understood that you are (Client Name) of (Company) and have read and understand the Terms of Service.**

#### 4. ONBOARDING

**Overview.** In this portion we will transfer the documents to the client.

##### *eCom Process Onboarding Script*

##### **Search Home Functions**

- ❖ Category – You can search by Category to pull up a group of processes. This is not a way to find specific SOPs, but can be useful to see what is in the Category as a whole.
- ❖ Search Bar - You can type your request in a question format to isolate a specific question you want answered.
- ❖ Your Favorites - Use your Favorites to shortcut to SOPs you use frequently. This can save you hours of time. We will show it's use later on.
- ❖ Popular Searches - Use Popular Searches to see what searches are trending. The darker the wording, the more the term has been searched.
- ❖ New This Month - Below you can see all of the new SOPs, Courses and Task Boards added over the past month. See the "rev" number to know if the item is "New" or "revised".
- ❖ Search for Term “Review Recovery” - In this example we used the "Search Bar" to search for a common issue in the Amazon Selling realm. The term searched was "review recovery" Let's show you how to use these results!
- ❖ Relevance - The "Relevance %" is a great indicator of the likelihood this particular process will give you the information you need. The higher the percentage the better.

##### **Process Page**

- ❖ Actual Process – Video, Images, Text
- ❖ Favorites Button - Click it!
- ❖ Report Content – Used by Admins and Staff to report issues found in SOPs
- ❖ Related Posts - Below you can see that our system gives you alternatives.
- ❖ In this case It gives you processes that would let you "email" a negative reviewer.

**Instructions Page**

- ❖ Video's – When in doubt on how to proceed with a task then this is the place to come. This page is constantly being updated based on changes to the system.

**Courses Dropdown**

- ❖ Dropdown – Go to eCommerce Customer Service – Most of these courses

**Software**

- ❖ Explain that these software's are directly tied into the eCom "User Base"
- ❖ AZanalyzer – Product Research
- ❖ AZoptimizer – KW research and listing optimization
- ❖ eCom Kanboard – Kanban Task management software

**Other Taskboards / Main Board**

- ❖ Separate tasks to upload the main board to the leading task management solutions

**Account Page**

- ❖ Adding Staff - In order to add staff we have a detailed video for you to watch.
  - This adds staff automatically in to AZanalyzer, AZoptimizer and Kanboard.
  - If you want to remove the staff member from all of these then simply press the delete button.
- ❖ Log-ins – Admin (How it works); Staff (How it Works)
- ❖ Advice – Admin should change their Kanboard Password to their eCom Process log-in password to avoid confusion later on. I will show you how to do that once we dive into the Task management software.

**Task Templates Page (Listing Optimization)**

- ❖ Show Dropdown – This is the heart of the task management side of the system. These are the templates that bring all of the system functionality together into coherent modules that are easily integrated. We will be spending quite a bit of time on this particular part of the system.

## **Kanboard Software**

- ❖ AEM Account – As a fully accredited and certified Amazon brand management agency, we provide services to some of the largest companies on Amazon. In order to do this effectively we have to have a task management system to keep track of all of the tasks going on daily. There is a lot going on in this software and we won't be able to go over all of the massive functionality. I will instead be focusing on some of the tools we use to make it as effective as possible

## **Key Kanboard Presentation Points**

- ❖ Password Change – Top right > My Profile > Change Password – (Recommend changing it to your eCom Process PW)
- ❖ Dashboard
  - Show how it can be reached (Logo or top right menu “Dashboard”)
  - Projects = Boards
  - Task Summary is automatic
  - Can see required tasks and updates at a glance
- ❖ Set-up
  - Top Right > Settings > Project Settings
    - Template, Backlog, Ready, Work in progress, Done
  - Top Right > Settings > Application Settings
    - Change Language and Timezone
- ❖ Boards
  - Look in at BBM – Customer Service Board (Something requires attention!)
    - Color Coded
    - Templates Added
    - Backlog
    - Show Backlog Issue
    - Mention menu items on left hand side.
  - Look at ACT – (Something requires attention!)
    - Check backlog
- ❖ Flatfile
  - ORCA Flatfile import
    - Look at the different objects in the flatfile and pay most attention to the following
      - Assignee Username
      - Color Name
      - Column Names
      - Swimlanes
  - Create ORCA Project (New Project) – Certain variables must be set-up
    - ORCA – Product Listing Optimization – Whisk (V)
    - Add Swimlanes
      - Red/White
      - Blue/Green

## ECOMOB-01 eCom Process Onboarding Checklist Rev.1

- Add Staff using email addresses > Permissions
  - [dony@atlanticeastmarketing.com](mailto:dony@atlanticeastmarketing.com)
  - [davidbar@atlanticeastmarketing.com](mailto:davidbar@atlanticeastmarketing.com)
  - [alemar@atlanticeastmarketing.com](mailto:alemar@atlanticeastmarketing.com)
  - [nirav@atlanticeastmarketing.com](mailto:nirav@atlanticeastmarketing.com)

**Road Map Forward**

- ❖ Software Company onboarding processes
  - Approach companies to provide SOPs in our format.
- ❖ Template to upload own Processes
  - Right now you would just link into dropbox ect.
- ❖ Amazon Course
  - Basics
- ❖ Task templates
  - Key

**5. Q&A**

**Overview.** Once you have sent in this initial email you will want to follow it up:

- Ask the client if they have any questions.
  - Answer any questions.
  - Record any client questions into the Onboarding Meeting Spreadsheet.
  - You can expect certain emails from us moving forward. Each of these emails will be important and you will want your VA to take a look at them. The most important emails will be about sudden changes on Amazon that will need to be addressed.
  - Also watch for an email in regards to the special deals we offer to you because you purchased this system. This includes software and services that you use every day in your Amazon business.