PROMO CLIENT ONBOARDING CHECKLIST

ENHANCED WITH ESP+ GUIDANCE

Follow these steps to get your promo clients up and running – and your sales flowing!

1. Initial Contact & Discovery

- [x] Gather client contact information.
  - Use ESP+ CRM to create a new contact. Navigate to the CRM tab and input client details, including name, company, email, phone and address.
- [x] Identify client's industry and target audience.
  - Use the Notes section in the CRM to record this information for future segmentation and personalization.
- [x] Understand client's goals for promotional products.
- [x] Determine budget and timeline.
  - Create the Project in ESP+. Use the Projects tab to get started. You can also set reminders for key deadlines.
- [x] Ask about previous promo product experiences.
  - Use the Client Portal to share a short survey or intake form, or log notes in the CRM for internal reference.

2. Account Setup

- [x] Create client profile in CRM.
  - Go to the ESP+ CRM tab and locate or create the company and fill in all relevant fields.
- [x] Assign internal account manager.
  - Assign team members to the client and the tasks.
- [x] Set communication preferences.

3. Branding & Design Assets

- ☑ Request high-resolution logo files.
  - Upload and store these in the client's CRM entry.
- ☑ Collect brand guidelines.
  - Store PDFs or links in the same Project Files area. You can also create a shared folder in the Client Portal.
- ☑ Confirm approval process for artwork and proofs.
  - Use the Client Portal to streamline proof approvals. Clients can view, comment and approve directly from their dashboard.

4. Product Needs Assessment

- ☑ Identify types of products needed.
  - Use ESP+ Product Search to explore categories like apparel, tech, drinkware, etc. Save favorites to a Collection.
- ☑ Discuss quantity needs and shipping destinations.
  - Add this info to the Project Overview or Order Notes in ESP+.
- ☑ Explore seasonal or event-based needs.
  - Use ESP+ Calendar or task reminders to plan ahead for holidays, trade shows, etc.
- ☑ Offer product suggestions.
  - Create a Presentation in ESP+ with curated product ideas. Use AI tools to auto-generate descriptions and client-specific messaging.

5. Quoting & Samples

- ☑ Provide product mockups or virtual proofs.
  - Use the ESP+ Virtual Sample tool to generate mockups with the client's logo.
- ☑ Send physical samples if needed.
  - Track sample requests and shipments in the Project Timeline or CRM notes.
- ☑ Deliver detailed quote.
  - Generate a quote directly from a Presentation.
- ☑ Confirm pricing and approval to proceed.
  - Use the Client Portal for quote approval and payment. Clients can approve and pay invoices directly online once you connect to a payment provider in ESP+.

For more guidance on using ESP+ to support your clients and sales, log in and select the Knowledge Base.