

# Boxpilot



# A Guide to Getting Started with Boxpilot


*Full-Service Pipeline Automation*



# Four Simple Steps



Our simple **4-step** quick-start process makes getting started with Boxpilot fast and easy.

- 1 Discovery Call**
  - 2 Kick-Off Call**
  - 3 Paperwork**
  - 4 Plan Approval**
-  **Start**



# Discovery Call



- Initial meet-and-greet
- Sr. VP Sales & Solutions and Client
  - ❑ Get to know Client
    - Challenges and Objectives
    - Sales & Marketing History
  - ❑ Get to know Boxpilot
    - Offerings, Capabilities
  - ❑ Review this Getting Started Guide
  - ❑ Book Kick-Off Call



# Kick-Off Call



- Gather information to make plan
- Sr. Client Program Strategist and Client
  - ❑ Gather key information from Client
    - Content Audit, Past Results
    - Buyer Personas
    - Data/List, Tracking Goals
  - ❑ Budget, required ROI on spend
  - ❑ Book First Plan Approval Call



# Paperwork

- Client signs back paperwork
  - ❑ On-Demand Services Agreement
  - ❑ Credit Card Authorization
  - ❑ Initial Month Retainer Charged



# Plan Approval



- Plan presentation and discussion
- Sr. Client Program Strategist and Client
  - ❑ Review Strategy & Contacting Plan with Client
  - ❑ Discuss changes, revisions, updates
  - ❑ Discuss and forecast estimated response rates
  - ❑ Client approves Strategy & Contacting Plan



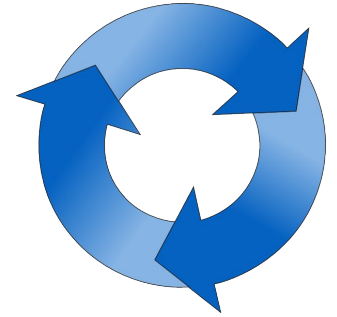
# Start



- Once plan approved, development begins
- Client Success Manager and Client
  - ❑ Client Success Manager is lead project manager
  - ❑ Content developed according to contacting plan
  - ❑ Workflows programmed into automation tool
  - ❑ Client signs off on content and programming
  - ❑ Programs Begin



# Ongoing



- Programs in motion and being executed
- Client Success Manager and Client
  - ❑ Sr. Client Programs Strategist oversees results
  - ❑ All-hands weekly meeting to review progress, results
  - ❑ Regular tweaking, improvement, testing and updates
  - ❑ Programs continually improved, compounding results
  - ❑ Subscription begins on first day names uploaded
    - First charge pro-rated to end of first month
    - Thereafter on first day of month in advance
  - ❑ All other services are charged at end of month





# The Right Experience



We've learned the strategies from our big company clients, and now you benefit from that experience.



# Proven Success



Our proven track record of success speaks for itself:

- 15+ years in operation
- 17 million+ touches, 17,000+ multi-touch programs
- 1,100+ clients: Leading SMB to Fortune 100 firms



# Choose Your Next Step...



Watch this [video](#)  
to learn more.



Complete getting  
started [paperwork](#)



Or call us at  
1-866-216-4233



