



Bulletproof Agency Checklist

Presented by

THE
JANICECHRISTOPHER
MARKETING AGENCY

In order to do business with a prospect you need:

Lead Generation (*ads, SEO, networking, referrals, etc*)

A Google Business Profile that's optimized (*listings + reputation management!*)

A great reputation (*no stuffing!*)

A kickass website (*for humans and search engines*)

A social media presence

A booking system for setting appointments & sending reminders (*CalendarHero*)

A branded email, Google Workspace works well

A process for taking phone calls (*perhaps a phone service*)

A Zoom or Google Meet account

Your store must be set up in Partner Center including Packages

A system for sending a proposal that includes product/service descriptions (*Vendasta Proposal Builder*)

A CRM to keep track of client data (*Sales & Success Center*)

Google Workspace - Drive to collaborate and retain information

An onboarding process and questionnaires or templated emails

A payment processing system that allows you to securely store a credit card and do recurring billing

