Best Agent Business - New Client Checklist Days 1-10

The Days 1-10 Checklist is an important step to ensure that all required tasks and documents have been completed and returned. In order to move forward with any service, you must complete all tasks on the checklist. If you have any questions or concerns regarding the checklist or our process here at Best Agent Business, please contact your Key Assistant or client@bestagentbusiness.com. Once you've completed this checklist, please email the document to your assigned Key Assistant.

Note: *Please ensure you always have your checklist in front of you when you are speaking with someone at Best Agent Business. Also, please advise that per your signed service agreement you are to dedicate 2 hours/week to Best Agent Business for completing all projects.*

Checklist Item	Details	Date Completed
Welcome Call	This is your introductory call from your Key Assistant to get to know one another and to schedule your first 2 weekly Key Assistant Calls.	
Logins	Please view our Logins Wiki Page which discusses typical logins needed and send your logins to your Key Assistant and leads@bestagentbusiness.com.	
Financials	Please view our Financials Wiki Page which discusses the Financial information we need and why. Send information to accounting@bestagentbusiness.com.	
Core Lead Management	Please view our Core Lead Management page and complete necessary information.	
Key Assistant Call #1	Attend your weekly call with Key Assistant. The first few calls your Key Assistant will gather information from you in order to start services.	
Agenda #1	Review initial agenda sent and confirm you received it. Your agenda will have detailed information on the action items assigned to you and each team.	
Key Assistant Call #2	Attend your weekly call with Key Assistant. This call will be a continuation of gathering items from you in order to start services.	
Agenda #2	Review agenda sent and confirm you received it. Your agenda will have detailed information on the action items assigned to you and each team.	
Marketing KO Review	If you will be starting Marketing services, please review this document and send in necessary information prior to the Kickoff call.	
Lead Management KO Review	If you will be starting Lead Management services, please review this page and send in necessary information prior to the Kickoff call.	
Calling KO Review	If you will be starting Calling services, please review this page and send in necessary information prior to the Kickoff call.	

Note: *Please cc' your Key Assistant on all emails and reply all when emails are sent to you. This ensures your Key Assistant stays in the loop, as well as any other teams that need to know status of work.*