

Certified Consultant Conference Call NOTES - December 18, 2015

- **Welcome**
 - Our first Certified Consultant call!
- **What's Coming?**
 - Kickstart Kits: Build A List, Sell Your Stuff, and Membership Kickstart kits will be available in the ONTRAPORT forum soon so it can make it easier for you to build out in client accounts
 - Custom Objects will be out in beta soon. Consultants will get access to them as well - we're hoping to give you first dibs (as well as our internal staff) so we'll need your help to test and exterminate bugs.
 - Sandboxes for Consultants is coming soon. These accounts will be very limited in contacts and emails but full feature functionality for testing and demonstration purposes. We're hoping for end of quarter 1, 2015 but this is dependent on development.
 - Done-For-You funnels coming in a couple weeks: Two funnels will be released for you (and all referral partners) soon so you can drive traffic to valuable content marketing pieces and we'll take care of the lead follow-up.
- **Map of the Month**
 - Video Series Smart Reminder System: Get more opens and clicks by creating a system that reminds only those who haven't opened/clicked the initial email. One customer got 13% more opens/clicks and ultimately more sales!
 - Video Series Smart Reminder Map Download:
<https://www.lucidchart.com/publicSegments/view/54922997-628c-444d-b755-02650a00dcb1>
- **Discussion: Let's create the call**
 - We discussed what you'd like to gain from these calls in the future and the following ideas were brought up:
 - Client management items such as how to effectively manage projects, delegate, and outsource.
 - Consultant Spotlight so you get to know other consultants
 - Have Landon on a call
 - Have Business Solutions reps on calls so they can give you a demo, talk about what questions they're hearing and how they respond.
 - Comparison talks about Greenrope, Infusionsoft, and other systems
 - Our discussion also evolved into what tools/resources you'd like including:
 - Access to release notes
 - Providing recordings of these calls
 - Providing recordings of demos
 - Sales tools, decks, competitive analysis, etc.
 - Directory plugin so it's easier to find consultants
 - Lead boxes and lead links in ONTRApages like LeadPages