



Client Needs Worksheet

Explore Benefits





Upnetic HR Pro

Common Industries

Legal Services

Legal Forms

Business
Consultation

Business Planning
Software

Digital Marketing
Analyzer

Digital Media
Dashboard

Website Builder

Google Business
Profile

CRM

Learning Lab

Resources

— Upnetic HR Pro

Description: Upnetic, included in HR Pro, marketing tools, business consultation, and access to legal services.

Probing Questions:

- Do you have an attorney you can call for important business **legal matters**?
- How do you currently showcase your work & attract new clients? Do you have a **website**?
- Did you know that 93% of customers say that their buying decisions are influenced by online reviews on platforms like **Google Business Profiles**? Have you claimed your listing, and are you actively responding to reviews?
- How do you monitor your website and **social performance**?



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— Common Industries

Here are the top industries currently utilizing Upnetic HR Pro:

- Construction/Painting
- Daycares
- Consulting/Professional Services
- Insurance Agencies
- Health & Wellness Centers
- Spas
- Nail Salons/Hair Salons
- Cleaning Services
- Restaurants & Food Services



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— Legal Services

Get matched with a qualified attorney in your area for any legal need in your business.

Discovery Questions:

- Who reviews your business documents & contracts?
- Who do you go to for legal advice?
- How do you handle collection matters?
- Who makes legal calls on your behalf?

Features:

- Unlimited attorney consultations for each new legal matter, 30 minutes per subject matter
- 2 initial phone calls per month made on behalf of your business
- Registered Agent Services for the state in which the business is incorporated, as well as other states where business is conducted
- 5 independent document reviews per quarter, up to 10 pages each
- 10 initial Collection letters per quarter
- 3 initial letters per month for new subjects
- Plus, an exclusive 40% discount off attorney's normal hourly rate for all other services

Quickly connect with an Attorney through **Upnetic's free mobile app**, available for download through [Apple](#) and [Google](#).



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— Legal Forms

Find the documents you need in our library of customizable forms, from debt collection and independent contractor agreements to intellectual property and more.

Discovery Questions:

- Who drafts your legal documents?
- Do you have independent contractors?

Features:

- Extensive library of legal forms and documents
 - Confidentiality and Non-disclosure
 - Independent Contractor
 - Executive Employee Agreement
 - Promissory Note & more
- After completion, save and/or export the template to make further customizations



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— Business Consultation

Ask any business question, large or small, and we'll deliver a detailed answer.

Discovery Questions:

- Who do you go to for business advice?
- Who reviews your business documents?

Features:

- Get clear, complete answers to any business question related to:
 - Marketing
 - Sales
 - Tax & Accounting
 - Finance
 - Operations
 - Technology, and more
- 100% online & unlimited
- Answers in two business days, guaranteed!
- Ask questions on the go with the free Upnetic app



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— Business Planning Software

Our comprehensive do-it-yourself business plan software walks you through the entire process of creating a professional business plan, with both narrative and financial projections.

Discovery Questions:

- Have you created a business plan?
- How do you keep track of your financial statements and projections?
- Are you looking at obtaining funding from a bank or investor?

Features:

- Easy-to-use wizard, step-by-step guidance
- Create an unlimited number of business plans
- Easily access & update online
- Financial statements and projections, up to 5 years



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— Digital Marketing Analyzer

Identify key steps to improve your website and digital brand from web experts. Plus, schedule a 1-on-1 consultation to discuss your digital marketing.

Pre-Call Research:

- Check if their current website is optimized.
 - When searching for keywords on Google, does their site appear?
 - Do they have social media icons? Do they lead to their social media accounts?
 - Check at the bottom of the page for the date the website was last updated and what company created it.

Discovery Questions:

- I see you have a website for your business, when was the last time you updated it?
- Do you know how well your website is performing?

Features:

- Multi-point optimization analysis
 - SEO
 - Social Media
 - Website Performance
 - Accessibility
- Detailed instructional report within account
- 1-on-1 consultations



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— Digital Media Dashboard

Our digital media dashboard helps you manage your social media accounts in one place, and track your online metrics in real time, building your audience by engaging followers through social media.

Pre-Call Research:

- Search for social media accounts
 - When was the last time they posted?
 - Do they have an account for at least Facebook, Twitter, and Instagram?

Discovery Questions:

- How do you currently manage your social media?
- How do you track your social media posts and their performance?
- How do you track website analytics?

Features:

- Customizable dashboard
- Social media integration
 - Post & track Facebook, Instagram, LinkedIn, and Twitter business accounts
- Google Analytics integration
 - Identify how visitors are engaging with your website and how you can improve



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— Website Builder

Easy-to-use website builder with unlimited pages, pre-built templates, free hosting & subdomain, plus a free SSL certificate for added security.

Pre-Call Research:

- Check if the SSL is Installed (check for "Not Secured" or a lock icon on the top left corner of the address bar)
- Pull up the website on a mobile device and see if the website is mobile friendly
- How many pages does the website have? (we offer unlimited pages)
- Does it have a blog? (client can create a blog on our websites, it helps with SEO)

Discovery Questions:

- Do you have a website? When was the last time it was updated?
- How much do you spend on your website and hosting services per month?
- Do you make your own changes on your website or do you have to pay to have someone do it for you?

Features:

- Unlimited pages
- Free SSL Certificate (\$65/yr value)
- Free hosting & subdomain (up to \$80/mo value)
- Blog & multimedia capabilities
- Pre-designed templates
- Mobile & tablet optimized
- Google Analytics integration
- CRM contact form integration
- 1-on-1 consultations with web experts



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— Google Business Profile Optimization

Upnetic can claim and optimize your profile on your behalf to enhance local Google search and maps results.

Pre-Call Research:

- Search for the company on Google to locate listing
- Check if the listing has been claimed and optimized
 - Pictures
 - Website
 - Hours
 - Reviews and replies to the reviews

Discovery Questions:

- Do you have a Google Business listing? 90% of searches are performed on Google.
- Did you know that 93% of customers say that their buying decisions are influenced by online reviews?
- Are you actively responding to reviews on Google?

Features:

- DIFM creation & optimization service
- Enhance local search & maps
- Review management
- 1-on-1 consultations with Google experts



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— CRM

Streamline your sales pipeline, store all your vital contact data, and create and send beautiful marketing emails through Mailchimp.

Discovery Questions:

- How do you keep track of your clients and leads? Do you have a CRM?
- How do you track & convert your website leads?
- How do you stay in touch with past clients & ask for referrals?
- Do you send out email campaigns or newsletters to your client base?

Features:

- Track sales leads: this includes data pulled from the Upnetic website builder contact form
- Store & leverage prospect & customer data: easily import data from Excel
- Create tasks, events, & follow-up reminders for yourself, team members, or contacts
- Mailchimp email marketing integration
 - Upnetic will assist with setup, integration, & initial newsletter



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— Learning Lab

Get inspiration for growing your business with access to a library of sales & marketing focused videos & articles.

Discovery Questions:

- How have you adjusted your marketing strategies in response to the COVID-19 pandemic?
- Are you looking to grow your business but unsure where to start?
- Do you have an internal sales team or new sales professionals that could use tips and tricks for successful sales practices?

Series:

- Google My Business 101
- Marketing after Covid-19
- Finding Customers for a New Business
- The Convenience Revolutions
- Using Video to Promote Your Business



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Here are some helpful links:

- SBS.Upnetic.com - SBS Support
- Demo.Upnetic.com - Upnetic HR Pro Demo
- Upnetic.com/Legal - Upnetic Legal

Upnetic Support Center Contact Infromation

888.303.6789 | Support@Upnetic.com

Live chat available on all Upnetic websites

