

Client Demo Walk-Through Script (Example)



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Set the call up to succeed:

As with most things in life, failing to prepare is preparing to fail. Once you have your client's HighLevel account set up and ready to go, send them a link to book a walk-through call.

If you don't have a "Book A Call With Me" page/system set up yet, HighLevel's funnel builder, Calendars, and Booking Widgets make it easy to set one up :)

In your email to your client, be sure to give them all the information they need to prepare on their side (for example: Please be in a quiet space with a headset that has a microphone. We'll be sending using UberConference for the call and will be screen-sharing, so please join the call via a Google Chrome browser. Etc.)



Open the call by framing it and establishing the objectives

"Thanks for joining us on this call. I have 20 minutes blocked off for this walk through but if we end up needing more time, we can schedule another 20 minutes before we finish the call.

We have two objectives for this call:

First is to walk through a test claim of the landing page offer so that we can confirm you receive all the notifications that the system will send out. If we encounter any bugs during our test, I'll note them and our development team will address them.

Second is to ensure you leave the call knowing where and how to follow up with new hot leads as well as give you an opportunity to ask any questions you may have.

If you have any technical questions, I'll be sure to note those as well and follow up.

Ok, let's get started with demo."



Walk through the demo, checking off critical items as you go

I'm going to share my screen and head over to the landing page.

[Start screen share > view landing page]

This is the landing page where you ads will send traffic. Let's assume I've just clicked on a Facebook ad, which has redirected me here. The offer looks good to me, so I'm going to enter my information and hit submit.

[Fill out and submit form]

Here we can see the Next Step Page where people get redirected after they claim the offer. Embedded on the page is the booking widget, where people will request a time & date for their consultation.

Ok, you should now receive a text and/or email notification alerting you that you have a new lead and that the automation has begun working to convert it to a Hot Lead over the next few days.

- Confirm client received notification. (If no, troubleshoot Trigger #1)



Now let's create your login information and then we'll switch and have you share your screen from here.

[Create logins for client using their email for user and password then walk them through bookmarking the login url, logging in, and sharing screen]

Now that you're logged in, let's click on the Opportunities tab in the left column where we'll see the new lead in the New Leads column.

- Confirm lead populated in Opportunity Pipeline. (If no, troubleshoot Trigger #1 or Zap if form is external)

Next please go to the Conversations tab and click the All Conversations tab at the top, where we'll see the automated SMS that went out to me.

- Confirm automated SMS is showing in Conversations > Recents tab. (If no, troubleshoot A) YOUR OFFER Claim Nurture)

Now I'm going to reply to the automated text I received.

[Send reply: Thanks for the offer! Where are you located?]



Let's now have you go back to the Opportunities tab, where we'll see that the lead has been moved to the Hot Leads column because I replied to the automation.

- Confirm that opportunity was moved to Hot Leads stage. (If no, troubleshoot Trigger #2)

You should now receive a notification that you have a new Hot Lead waiting for followup.

- Confirm client received notification (If no, troubleshoot Triggers #2)

Next, let's take a look at the yellow All Notifications icon at the top right of the screen. See how there is a darker yellow dot at the top of the icon? This indicates that there's a new reply. Let's click that and the notifications pane will slide out.

Go ahead and click on that notification, and that will take us back to the Conversations tab, where you can continue the conversation. Go ahead and shoot me a reply.

If I didn't reply to the text, the automation would have followed up with an email which would also show here and you would have the ability to reply by email as well.



Now let's assume we chatted back and forth until I was ready to book. You could create an appointment for me right within this screen by clicking the Schedule button at the bottom right. Don't actually book me now though, as I'm going to book myself in just a minute.

Before I make a booking, let's go to the Settings > Calendars tab and confirm your Consultation availability is what you'd like it to be.

[Review calendar settings with client]

Ok, let's assume I'm going to follow the automation's instructions and book on my own on the Next Step page. I'll pick a time and date and submit my request.

[Submit a booking request]

Now that I've requested an appointment, the system will send me a text/email notification letting me know my request has been received but that someone from your staff will follow up to confirm the date & time I selected.

- Confirm that you receive the auto-reply email/text (If no, troubleshoot Trigger #6 and/or campaign D) Booking Requested Reply)



Let's go to the Opportunities tab where we should see that my opportunity has been moved to the Booking Requested stage of the pipeline.

- Confirm opportunity moved (If no, troubleshoot Trigger #6)

You should now receive a notification that a new booking request has been made.

- Confirm client confirmed they received notification (If no, troubleshoot Trigger #6)

Now, please click Scheduling > Calendar and find my pending yellow appointment. You could open that up and confirm me via the Status dropdown, but let's not do that yet.

Let's instead go to the Scheduling > Appointments tab, where we'll see my pending appointment that needs confirmation. Go ahead and confirm my booking via the dropdown.

Confirming my booking triggers another automation that will send me a confirmation email & text message as well as appointment reminder emails & texts leading up to the appointment.



- Confirm that you receive the first notification. (If no, troubleshoot Trigger #7 and/or campaign E) Appointment Reminders)

Now let's pretend I didn't show up for my consultation. Let's go back to status and change me to 'No Show'.

Changing my status to No Show triggers another automation that will send me more texts & emails prompting me to reach out to reschedule. When I do, I'll automatically become a hot lead again, the process repeats.

- Confirm you received the first item from the No Show campaign (If no, troubleshoot campaign B) No Show Nurture)

Next, let's pretend I did show up and you sold me a service. Let's move my opportunity to the last column, let's open my opportunity, scroll down to the value field, enter the amount I purchased, and save. This process is crucial for our optimization and reporting purposes.

Lastly, let's pretend I just finished my service. As I'm walking out, if you know I had a good experience, you can easily trigger a review request by clicking the "Check In Client" button at the top left.



Ok, that's the whole process. If all else fails, just log in and check the yellow icon at the top right of the screen. If it has the dark yellow dot over it, there's someone waiting for follow up in the communications or scheduling tabs.

Do you have any questions about anything we covered?