Onboarding Guide

How to work with your
customer to deliver your
Sales & Support Agent

Onboarding

What to Expect After Purchase

Setting expectations right after purchase is key, otherwise clients don’t know what to prepare or when things will happen.

This guide explains **what happens after purchase, what clients need to provide, and what they can expect from you.**

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What to Expect After Purchase

When a client buys your Sales & Support Agent, the process is simple and structured. Here's how it works:

Step 1: Initial Consultation

- You'll schedule **one meeting** to understand their business.
- In this meeting, you'll discuss:
    - What they do and what they sell
    - Any current promotions or special offers they want to highlight
    - How they currently handle sales and support
    - What they want from a sales & support agent
    - What you can deliver with a sales & support agent

Step 2: Information You'll Need

After the consultation, the client provides the key information needed to build their Sales & Support Agent:

- Basic **business details** (name, address, email, contact names etc.)
- Business documentation relating to their operation as it relates to website visitors.
- Products and pricing list
- Links (full urls) to important website pages (such as promotions or product purchase pages)

- The pages of the website that are relevant to the sales & support agent. i.e. Home page, contact-us page, About-us page, contact forms, services and product pages. This would be agreed in consultation.
- **Contact details**:
    - Contact form links
    - Sales and support phone numbers
    - Contact names, if needed

Step 3: Access Requirements

To set up the Sales & Support Agent, the client must give you:

- **Access to their WordPress website** (to install and configure the chatbot plugin)
- An **OpenAI (ChatGPT) account** that will power the assistant
    - You'll need access to configure the assistant and upload supporting files

Optionally you can use your own OpenAI account and create a separate project and API key specifically for each customer. That way you can monitor and report API cost per customer.

This option will incur API costs during the free trial.

This will likely be a better option when offering promotions like 50% off, or for ongoing contract after the free trial. However using your own API reduces the actions required by the customer and makes things simpler.

Step 4: Build & Launch Timeline

- Once you have everything you need, you'll take **up to 7 days** to:
    - Configure the Sales & Support agency
    - Upload their files and business information
    - Test the assistant to ensure it's ready
- After testing, their **30-Day Free Trial** begins.

Step 5: During the Trial

- The Sales & Support Agent runs live for 30 days.
- The client can cancel or request the agent be disabled at any time.
- Customer should report any issues or inconsistencies so that the AI agent can be further trained.
- If they want **extra features or reconfiguration** (e.g. new promotions, product changes) during the trial, this will be billed as an additional cost.

Step 6: End of the Trial – Next Steps

At the end of the 30-day trial, the client has four options:

1. **Do not continue** — the agent is turned off.
2. **Continue as is** — pay a one-off purchase fee for the existing setup plus monthly API costs if using your own API key.
3. **Continue with ongoing changes and support/maintenance** — pay the one-off purchase fee plus a monthly service cost for updates and support.

4. **Continue with ongoing changes and support/maintenance/additional services** — pay the one-off purchase fee plus a monthly service cost for updates and support plus separately agreed costs for additional services.