



STACK STRATEGIES CO.

Small Business Digital Marketing Agency

CLIENT ONBOARDING WELCOME PACKET



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Contact Information

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SOCIALS	@stackstrategies



LET'S BUILD THE BUSINESS OF YOUR DREAMS TOGETHER...

Welcome! We are honored to partner to grow your business. Your success is our priority, and we look forward to helping you achieve your business goals.

At Stack Strategies, we believe in the power of strategic, creative marketing to transform businesses. We are committed to empowering business owners with innovative digital tools that lead them to success. After growing hundreds of businesses across the country, we're confident that you are soon-to-be another success story, too.

Thank you, again, for choosing Stack Strategies Co. We can't wait to get started on this exciting journey together!

Dezaree Stack

dezaree@stack-strategies.com

www.stack-strategies.com



WHAT OUR CLIENTS SAY ABOUT US

Stack Strategies was amazing to work with. They built my business an amazing website and they understand how to keep you at the top of google searches. I have received so much more business from google searches after I had them do my website. Return of investment was made fast!

- Rachel P. 2022

Stack Strategies is amazing! They have helped me take my business to the next level. The advice, recommendations and complete overhaul of my website has been nothing short of amazing! Business has definitely been increasing by the day and clients have given wonderful feedback. Stack Strategies is well worth the investment, especially if you want to grow your business and take it to the next level.

- Heather B. 2022

Stack Strategies has been a HUGE part in the success of my travel business. Dezaree and the team are very smart with creating a robust company website & digital marketing material for a successful company. They are is reasonably priced and with every penny!!!! Keep Up the EXCELLENT Work!

- Kim C. 2023

Dezaree, with Stack Strategies truly helped us take the training wheels off of our business. There are a lot of unknown gaps in our journey of becoming new business owners, but she helped us get on track and have a thorough, detailed strategic plan to achieve our goals. Thank you, Dezaree!

- Hope N. 2023

MEET THE TEAM



HELLO! I'M DEZAREE

CEO and Marketing Manager

I started Stack Strategies with a dream to help other business owners become the CEOs of their dreams. I can't wait to teach you how to use digital tools to become more successful. It's my mission to help you reach your goals.



HI, I'M ROBERT

Business Strategist

Looking to boost your business? I offer strategic business development, CRM implementation, analytic reporting, and optimizing team business structuring services to drive growth. Let's work together for your company's success!



HI, I'M SYDNEY

Content Designer

I specialize in combining resources and trending insights to create a compelling brand story. Through web design, campaigns, and automation, I engage audiences and build lasting brand connections. Let's bring your business's process and story to life to make a meaningful impact!

OUR PROJECT SERVICES

We're digital tool experts, including Meta for Business, Wix, Google, and CRMs. We specialize in making these tools work seamlessly together with your business processes. Our services are designed to meet you on their marketing journey, wherever you are on that path, to help you grow.

1

CHOOSE A PACKAGE

After we understand your project needs, we'll begin implementing our strategies and getting your business onboarded to SS

2

GET YOUR DIGITAL TOOLS

During onboarding, we'll need access to your digital tools. Upgrades may be needed based on your project choices.

3

PREPARE FOR GROWTH

Once we have access and your content is submitted, we'll be hard at work building your business. In the meantime, you can get ready for the launch!

In addition to this Welcome Packet, **you should have received your project's outline and QuickBooks estimate/invoice by email.** Listed in your project outline is a list of strategies and digital tools recommended for your business based on your business process and project goals. We kindly request your thorough review of this document and appreciate any insights regarding potential project adjustments.

OUR PROJECT PROCESS

Here's a look at our project process. **You will receive a status update every Friday** to keep you updated on the project.

STAGE 1 ONBOARDING

- Initial Consultation
- Proposal & Agreement
- Submit 50% Deposit
- Submit Business Profile

STAGE-2 KICK-OFF

- Digital tools access/upgrades
- Industry Research
- Brand/Project Development
- Submit content via Google Drive, WeTransfer, or email

STAGE-3 CREATING THE DRAFT

- Project is designed
- Content is completed
- Meet to review
- 50% Project Payment is due

STAGE-4 EDITING & LAUNCH

- Edits are submitted during meeting or via Markup tool
- Edits must be submitted in three (3) days
- Project is finalized
- Launch resources are provided

TIMELINE OPTIONS

TWO WEEK TIMELINES

Swift and cost-effective, our two-week timeline is perfect for basic projects, brands, and websites. The list of standard 2-week projects are listed below.

TWO WEEK PROJECTS

- Brand projects
- Profiles & digital tool projects
- Start-up brand + website substitute package
- Basic websites (up to 10 pages)
- Website updates
- Lead automations

FOUR WEEK TIMELINES

Great for more complex projects, our four-week timeline covers planning, development. This allows ample time for optimization for advanced projects.

FOUR WEEK PROJECTS

- Expertise, team or corporate websites
- Start-up brand + site packages
- Sales process automations
- Multi-series automations

EXTENDING A TWO WEEK INTO A FOUR WEEK PROJECT

If you find that the standard Two-Week Timeline we recommend for your basic project needs more time, you can request an extension. Just keep in mind that extending the timeline beyond the standard two weeks will incur an additional fee of \$400. This fee helps cover the extra time and resources needed to accommodate your adjusted schedule. We're here to assist you every step of the way.

PROJECT COMMUNICATION



PROJECT MEETINGS

- Project Kick-off Meeting
- Draft Review Meeting
- Editing Meeting
- Launch Meeting

BUSINESS HOURS IN EST

M	2-8
T	10-9
W	10-9
TH	10-9
F	9-3
S	10-12 appt only

RESPONSE TIME

Up to two-day response time for project questions to info@stack-strategies.com

Preferred Contact Method

We prefer to communicate primarily through scheduled meetings and email to stay on track with project timelines. This helps us ensure efficiency and meet your marketing goals effectively. **These appointments can be scheduled via Calendly at www.calendly.com/stack-strategies**

Stack Strategies share creative marketing tips via email, our blog and social media sites. Let's stay connected!

ALL PROJECTS & PACKAGES

BRANDING & DIGITAL TOOLS

- Custom Brands
- Coordinated Brands
- Brand Necessities
 - Business Cards
 - Flyers & Brochures
 - Posts, Banners & Signs
 - Booklets and more
- Full launch - - Google FB, Insta, Linktree, Calendly, plus
- Social Media Launch
- Domain Purchase & Launch
- Linktree
- Calendly

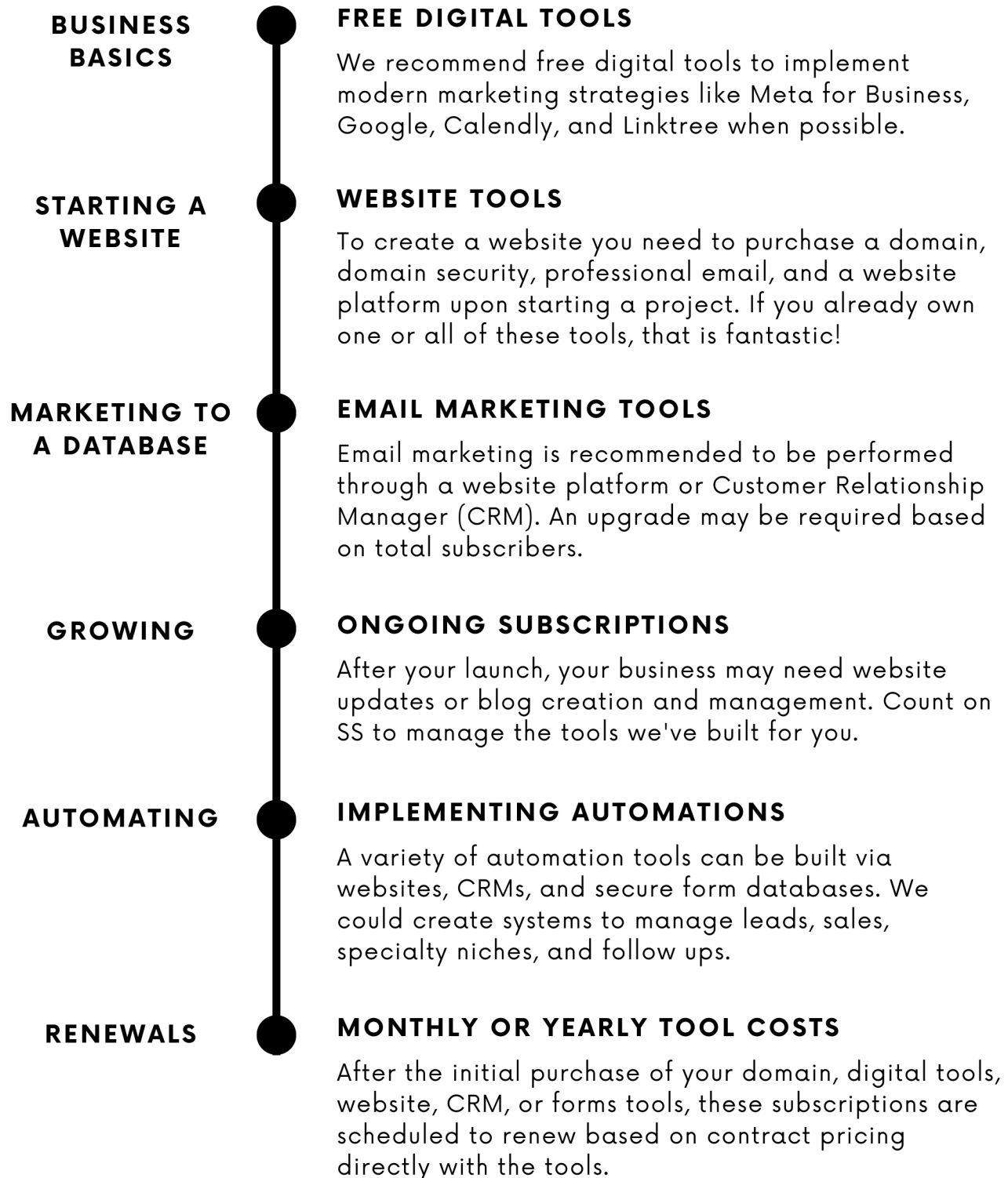
WEBSITES & PACKAGES

- Basic Site - up to 5 pg
- Enhanced Site - up to 10 pg
- Expertise Site - events, blogs, bookings, etc.
- Team Site
- Corporate Site
- Start-up basics package
- Start-up enhanced package
- Start-up brand + site substitute

AUTOMATIONS

- Lead Piece + Email Series
- Sales Process - 3 series / 30 emails
- Basic series - 1 series / 10 emails
- Basic multi-series - 3-6 series / 30 emails
- Enhanced Multi-series - 10 series / 75 emails

UNDERSTANDING THE PROGRESSION OF BUSINESS & DIGITAL TOOLS



WHAT TO EXPECT FROM THIS PROJECT

WHAT YOU'LL RECEIVE

Based on your project package, you can expect to receive the following results from our services...



For Brands: Logo Variations, Profile Kits, and Branding Guidelines



For Digital Tools: Content, Tools, Links, and Education




For Websites: Website Design & Setup, Domain Connection, SEO Basics Completed, Basic Google for Business Connection (if applicable), Site Management Basics Training, Launch Posts, QR Codes, Additional Education (for websites with a blog, event space, or bookings)



For Automations: Digital Tool Set-Up, Profile Creation, Form Creation, Email Template Design, Automation Building, Educational zoom session





Frequently Asked Questions

Which brand package is best?

Ultimately, the choice between a custom brand package and a coordination project depends on your business's circumstances, goals, and budget. We offer flexible brand solutions that empower businesses of all sizes to make the right branding choices. We can determine what's best for your business in a consultation call.

What do I need to start a website?

In summary, to start a website, you'll need to a brand identity, relevant domain, set clear goals, a website tool (we can guide you through upgrading), and to provide content like images, videos, and links. In the future, you will want to consider SEO, security measures, and marketing strategies. Optional resources include product listings, pricing, and a blog. Regular updates and scalability are crucial for long-term success.

Is a website necessary to grow a business?

A website is increasingly important for business growth in the digital age, serving as a 24/7 online presence, boosting credibility, enabling online sales, and centralizing marketing efforts. Its necessity depends on your industry and goals, but it's valuable for most businesses.

Which website tool is best?

The best website tool depends on your needs, but we specialize in Wix, Shopify, and Travefy because we believe they are among the best options available. We're experts in these platforms and can help you choose the right one for your specific requirements.

Do you help with Google and SEO?

Yes, we provide assistance with Google and SEO. Our services include setting up the necessary tools to connect your digital tools with Google and promoting your search engine ranking. It's important to note that SEO is a long-term marketing strategy that requires ongoing effort and advanced maintenance by a dedicated website manager to achieve optimal results.

When can my business implement automation tools?

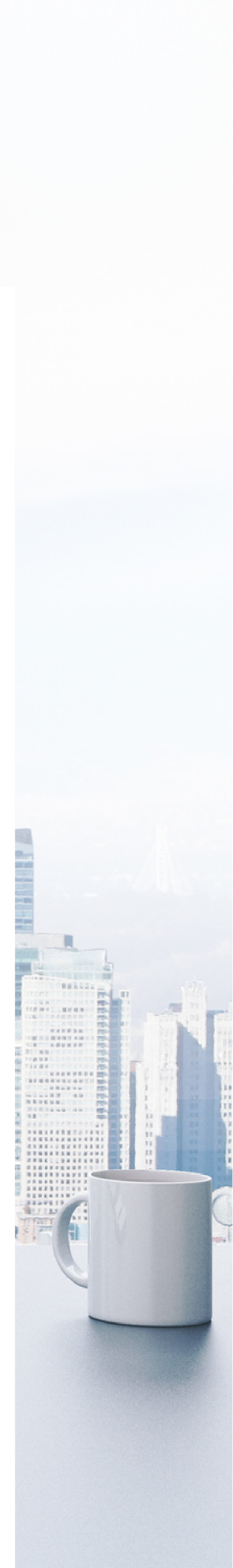
Your business can implement automation tools at any time, but the sooner, the better. Starting early can streamline processes and boost efficiency, providing a competitive advantage by simply communicating consistently with clients and leads.

Which automations tools are best?

The best automation tools vary by business process. We use forms, scheduling tools, emails, links, and more to create custom marketing automations, always prioritizing the tools' ability to assist the business while remaining cost-efficient.

How can I save money on the cost of a project?

To cut project costs, think about scheduling a VIP Day session. We'll work together on marketing project tasks, and you'll gain the know-how to wrap up the project on your own. It's a cost-effective way to get things done while learning.





PROJECT & PAYMENT TERMS

50% DEPOSIT / 50% DRAFT PAYMENT

Our payment terms require a 50% deposit at the outset, with the remaining 50% due upon completion and approval of the draft. Please note that no edits or revisions will be initiated until the second payment is received.

PROJECT OUTLINE & TIMELINE

Additional project requests beyond the project outline scope and timeline may result in extra costs, including but not limited to \$200 per extra week, \$175 per additional page, \$50 per additional section, or our standard service list prices for other project-related requests.

FULL PROJECT TERMS

Please find all project terms and details outlined on our website at stack-strategies.com.

What's Next to Get Started

REVIEW PROJECT OUTLINE

Review the project outline to understand what's included, the necessary requirements, recommended tools, specific timelines, and the overall project cost.

CONNECT FOR DISCUSS UPDATES & QUESTIONS

If you have questions or suggestions about your project, let's schedule another consultation to discuss any important topics via a phone call or Zoom meeting.

PREPARE FOR UPCOMING TASKS

To get started on your project, prepare to complete the required business owner tasks within the first week of your project kickoff.

”

*A GOAL IS A DREAM
WITH A DEADLINE*



BUSINESS OWNER CHECKLIST

Follow the steps below to get ready for the project

CONFIRM PROJECT EXPECTATIONS

Discuss and confirm your expectations regarding project outcomes, including design preferences, functionality requirements, and any specific goals you want to achieve.

BUSINESS PROFILE FORM

If you're a new business working with SS, please accurately [complete our intake form](#).

REVIEW OUTLINE, ESTIMATE & TERMS

Review the project outline and estimate which outlines the scope of work, terms, and deliverables.

PAY YOUR INVOICE

Pay the initial 50% payment by the project start date at 10 AM EST, and make note of the next installment's due date as outlined in the estimate.

KNOW YOUR TIMELINE

Know the key milestone dates and stick to the plan to stay on track. Project delays could result in fees.

PREPARE FOR PROJECT NEEDS

Start to gather content such as links, photos, and other resources as needed for the project. We will require this is provided during week one of your project.

UPDATES & ONGOING MAINTENANCE

Options for future updates to your digital tools

INDIVIDUAL UPDATES

- S40 Update domain address, logo, phone number, email address or other contact information
- S40 Update text on a document or webpage
- S40 Update Calendly
- S40 Update Linktree
- S50 Add a link with a new section to a webpage
- S125 Add/update to group or event page on Wix
- S200 Add/update to multiple groups or events (maximum 5 events or groups)
- S100 Add/update to reviews (up to 5 new reviews)
- S300 Add/update to team with new biography
- S450 Add/update to team with new biography and launch package
- S150 Add/update photos or links (maximum 50 photos and 10 links)
- S175 Update to multiple sections across the website
- S175 Create a new page with new content
- S125 Create a digital form (with no logic) and connect to site or tools
- S250 Create a digital form (with logic) and connect to site or tools
- S350 Create a blog on a Wix Website
- S450 Updates to SEO on a Wix Website (up to 12 pages)
- S400 Updates to Extensions Content (including up to 100 trips being updated)

ONGOING PROGRAMS

- S285 Quarterly audit & updates + 90-min Session
Up to 5 hours design per 13 weeks
- S95 Monthly Quick Fix (no meetings)
2 hours design + 2 hours support/research
- S165 Moderate Maintenance (one hour meeting)
5 hours design + 3 hours support/research
- S300 Monthly Premium Updates (2 hour meetings)
7 hours design + unlimited hours support
Management / marketing advice

Looking forward to working with you...

We are honored to work with you! If you have any questions or specific project needs that you'd like to discuss before we get started, please don't hesitate to reach out. Feel free to contact us via email, give us a call, send a text, or visit our website. We're here to support you through every step of the way. We can't wait to collaborate and achieve great results together!

Thank you again for choosing Stack Strategies Co. to grow your business through digital marketing.

*THE SECRET OF GETTING
AHEAD IS GETTING STARTED.
LET'S GET STARTED!*



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THANK YOU FOR CHOOSING STACK STRATEGIES CO. TO GROW
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HERE TO SUPPORT YOU EVERY STEP OF THE WAY!