

# ANGRY APPLE MEDIA ONBOARDING PROCESS

Your Guide to Implementing the CORE  
System



# ONBOARDING GUIDE



## WELCOME TO THE CORE!

The trainings below will be accomplished through a blend of online meeting sessions and discussions. We've segmented these sessions into:

**REQUIRED TRAINING**

**FLEXIBLE TRAINING**

The Onboarding Process is designed to be a comprehensive, flexible program personalized to each partner. As a new user, you'll be paired with an Onboarding Specialist to guide your implementation & ensure your success within our application.

Below is an overview of the suggested meeting sessions to complete during the first 60 Days of our partnership.

### Onboarding Introductory Call

 Attendees: Primary Contact & Account Manager

✓ **Call Objectives:** Review Goals, Overview the Onboarding process, Clarify Expectations & Discuss Next Steps

### Kickoff Call

 Attendees: Agency Principal, All Key Team Members

✓ **Call Objectives:** An overview of the our CORE application. This session focuses on an introduction to the CORE application and completion of the basic setup.

### Integration

 Attendees: Primary Contact, Tech Resource, Your Developer

✓ **Call Objectives:** Complete the CORE setup by integrating with the tools/systems you currently use. Will require a team member with access to your domain.

Additional training calls continued on next page.


### Onboarding Exit Call

 Attendees: Primary Contact, Onbarder, & Account Manager

✓ **Call Objectives:** A review of the Onboarding process and an introduction to the CORE Customer Success Team.

These calls can occur at your own pace, and can be organized in any order. You're not limited to these sessions, please consult with your Onboarding Specialist to cover any additional materials.

## Contact Manager & CRM

 **Attendees:** Primary Users, Content Creators


- ✓ **Call Objectives:** Review the processes for creating and managing contacts, using our CORE Personas, and the functionality of the sales & opportunities dashboard.

## Form Creation & Integration

 **Attendees:** Primary Users


- ✓ **Call Objectives:** Create and style easy to customize forms with our CORE Form tool, or work with your Onboarder to integrate with the 3rd Party forms you currently use.

## Email Functionality & Media

 **Attendees:** Primary Users, Content Creators

- ✓ **Call Objectives:** A step-by-step walkthrough to creating, editing, and sending trackable emails and media within the CORE System.

## Landing Pages & Blogs

 **Attendees:** Primary Users, Content Creators

- ✓ **Call Objectives:** Review the process and best practices for single Landing Page creation, designing Landing Page Funnels, and publishing blogs in our CORE System.

## Automations & Lists

 **Attendees:** Primary Users


- ✓ **Call Objectives:** Learn how to create, modify, and test automation tasks, workflows and lists. Review basic automations, segmentations, and best practices.

## Analytics, Tracking & Reports

 **Attendees:** Primary Users


- ✓ **Call Objectives:** Review the CORE's various reporting functionalities and learn how to create unique tracking for specific marketing tactics.

## Creating a Marketing Campaign

 **Attendees:** Primary Users, Marketing


- ✓ **Call Objectives:** To work with your Onboarder to create a personalized marketing strategy, making use of a variety of tools within the application. (Can be repeated as required).

## Dynamic Content Overview

 **Attendees:** Primary Users, Marketing


- ✓ **Call Objectives:** Learn how to create content personalized to each contact with the dynamic functionality of our email and landing page tools.

## Advanced Automation Strategy

 **Attendees:** Primary Users


- ✓ **Call Objectives:** Review internal vs. external automation, trends & concepts in marketing automation, and strategies for automating additional processes.

## SharpSpring API

 **Attendees:** CORE Support, Your Developer(s)


- ✓ **Call Objectives:** Review the capabilities of the CORE System Open API to connect your 3rd Party application to our internal CRM.

## CRM Migration

 **Attendees:** CORE Support, Partner Resource

- ✓ **Call Objectives:** Review data configuration and formatting requirements for a successful CRM migration. Work directly with our team to complete migration.

## Shopping Cart

 **Attendees:** CORE Support, Your Developer(s)

- ✓ **Call Objectives:** An overview and setup of CORE's Shopping Cart Integration functionality. Requires connecting to an external shopping cart tool.