Fuse Onboarding Checklist

Call 1

- ☐ Activate your Fuse account
- ☐ Configuring company information
  - ☐ Company name, Address, Phone number
  - ☐ Website, Social media links, Google Review Link
- ☐ Integrate with your management system
- ☐ Schedule the remaining 5 onboarding calls

Call 2

- ☐ Mapping - Policy and Employee (if needed)
- ☐ Enter Profile information for employees (phone, title, calendar links)
- ☐ Configure additional Locations (if needed)
- ☐ Configure standard Email Theme
- ☐ START (Optional but recommended) DNS Configuration

Call 3

- ☐ Review accounts tab and segment builder
- ☐ Set up Customer Appreciation one-time broadcast message

Call 4

- ☐ Send Customer Appreciation broadcast (if not done on last call)
- ☐ Review Quickstart vrs Custom campaigns
- ☐ Set up first campaign and launch or prepare to launch on next call

Call 5

- [ ] Launch first campaign (if not done already)
- [ ] Review other campaign/sequence types
    - [ ] NPS
    - [ ] Account Review & X-sell
    - [ ] Newsletters
    - [ ] Birthday & Holiday
- [ ] Review Forms
- [ ] Prepare/Launch 3 additional foundational campaigns

Call 6

- [ ] Launch remaining drafted foundational campaigns
- [ ] Review Outbox
- [ ] Review Activity & Email Metrics
- [ ] Review Dashboard & Business Insights
- [ ] Review Alerts & Chat
- [ ] Schedule Exit Call with Support

Campaign Choices:

Broadcast: (Call 4)

- [ ] Customer Appreciation

High Engagement Campaigns: (Calls 5-6)

- [ ] Choose 2 of the following:
    - Insurance Intel
    - Holiday
    - Birthday
    - NPS
- [ ] And At least 2 of the following campaigns:

Personal Lines Campaigns

- Account Review
- Welcome Kit
- Cross-sell: Home No Auto
- Cross-sell: Auto No Home
- Cross-sell: Life

Commercial Lines Campaigns

- Account Review
- Welcome Kit
- Cross-sell: Cyber Liability
- Cross-sell: Work Comp