## **Getting Started: Yext White Glove Services**

### The White Glove Team is excited to work with your users! Before we can start providing our services, we need to know more about how things work at your business. Please answer ALL of the questions in Sections 1 and 2, as well as all questions for each White Glove Service that you have purchased.

### **NOTE**: This checklist is designed to be completed during or after your White Glove Services working session. In this working session, your Client Success Manager or Implementation Manager will review the services you have purchased and the purpose of this document.

### **Confirm White Glove Service Contact Channels**

*Your users can contact Yext White Glove Services via email, phone, or chat. You can choose the email alias (**....@yext.com**) that your users will contact. Your Implementation Manager or Client Success Manager will provide the correct phone number for your users.*

**Email Alias:** *Your-Alias@yext.com*

**Phone:** *No action needed here. Yext to Complete.*

**Chat:** *No action needed here. Know that this is an open channel of communication.*

### **Section 1: Background on Yext Program**

1. **How will you message Yext to your users? What can Yext White Glove Services expect users to know about Yext?** *Please link or attach any documents and messaging you plan to send to the field, e.g., introductions to Yext, introduction to White Glove Services, and Platform Access Eligibility (link to Google Drive, add screenshots or email templates at the bottom of this document). If you have already provided this to your Yext team, please note that below.*

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1. **Are there any other systems, teams, or vendors Yext WGS should be aware of? Help us to understand the current ecosystem of tools and services that users currently have access to. How does Yext fit in?** *Please include the contacts that we can direct your users to regarding these services teams or tools. For example, is there a marketing support team your users can reach out to?*

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1. **Is there any documentation that exists on related systems, tools or processes that our team should be aware of?** *E.g., are you switching from an existing vendor that has similar functionality to Yext?*

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1. **Is Yext part of a larger program you are rolling out?** *If yes, what is that larger program? How do we fit into this program?*

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1. **Who or what team can we direct escalated questions to?** *Who should users reach out to for ongoing support, such as a Field Marketing team or Field Marketing Operations?*

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1. **Is the cost of the Yext program passed on to the user?** *If yes, how should we handle questions related to this? Should we direct this sort of inquiry to a member of your team?*

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**Section 2: Background Information on Your Users**

1. **Is this the first time these users have used a service like Yext?** *What were they using before Yext to manage their Listings/Pages/Answers/etc?*

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1. **What is the organizational structure between you and your users?** *For example: Corporate Marketing, Field Marketing Manager, Field Marketing Operations, the franchisee*

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1. **What systems would users go to to update the fields that push to Yext?** *How can we help them or direct them to make these updates?*

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1. **How should we handle Yext-related requests by your users that fall outside of their access within Yext?** *If a user cannot edit a field in Knowledge Graph, can Yext White Glove Services process updates for them?*

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1. **Who is authorized to create a Yext login for your users?** *Yext White Glove Services, or just you?*

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1. **What internet browsers do your users use?** *Chrome, Internet Explorer, or maybe it varies.*

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### **White Glove Service: Platform Assistance**

1. **What are your initial goals for Platform Assistance?** *What are the typical issues that have surfaced with users in the past you want to see solved? What are your KPIs?*

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1. **Should Yext assist users in getting Site Manager or Manager-level access to their Google My Business listings?**

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1. **Google My Business Ownership conflicts: Would you like Yext White Glove Services to help initiate ownership conflict resolution on behalf of your users?**

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### **White Glove Service: One on One Training & Advisory**

1. **What goals do you have for One on One Training & Advisory?** *What are the typical issues that have surfaced with users you want to see solved? Any KPIs?**Any particular actions you would like them to take during the training, such as activate Knowledge Assistant? Link any accounts? Opt in for reviews?*

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1. **Types of Training Calls / Products/topics to cover:** *(Onboarding, SEO, Review Response)*

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1. **Are there topics we should avoid? Anything you want us to say every time? Any brand sensitivities, specific nomenclature, terms or concepts we should be aware of?**

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1. **How do you want to share the scheduling link with field users?** *How will you encourage users to sign up for training sessions? Is it on the custom dashboard in Yext? Shared through email on internal help or marketing site?*

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1. **Which users are eligible for Training Calls?** *Is there a group of users at your company that is ineligible?*

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### **White Glove Service: Program Promotion**

1. **What goals do you have for Program Promotion and Webinars?** *What are the typical issues that have surfaced with users you want to see solved? Any KPIs?*

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1. **What are the 3-6 topics you would like these Webinars to cover?** *Selected Webinar Track / Custom Webinar Topics + Order*

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1. **Who can register for the webinars?** (Roles/Titles)

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1. **Are there any sensitivities to what can be demoed during a webinar?** *Can Yext show a real user's entity/entities?*

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1. **Tentative Schedule: Training Date or Date Range / Calendar Schedule.** *What dates and times each month? (E.g., Second Thursday of every (other) month at 11 AM PST, 2PM EST, or 10/4, 11/6, 12/3 at 11 3 PM EST)*

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1. **If you do not have platform assistance, where do we direct them for future help?** *Can we share contact channels, is there a help center?*

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1. **CSAT - What are you interested in feedback from webinar attendees?**

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### **White Glove Service: Content Approvals**

1. **What are the 5 fields you would like to add to the Approvals process?**

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1. **Guidelines for Approvals: what are the parameters for approval?** *Please include approval guidelines for each listed field. What is an example of approved content? What are the absolute no?*

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### **Additional Content**

*Please add any additional collateral used to either i) communicate the Yext program ii) detail your organizational structure iii) anything else that would be helpful here for Yext’s reference.*