



Concierge Setup Pre-Project Checklist

Items marked required must be provided prior to your first Website Strategy Call and can be submitted via the intake form after purchase. The more resources you provide to the team the better your results will be!



Credibility

Required

- ☐ Reviews/testimonials (Minimum three required)
Note: can be written and/or video testimonial including the clients name and a link if from social media account or YouTube.
- ☐ Company Logo
- ☐ [Google Business page](#), [BBB](#), [Facebook](#), [YouTube](#), Instagram, TikTok, etc. (Minimum one required) Note: if you do not have social media accounts, we highly recommend a Google Business page.

Optional

- ☐ Real Estate certifications



Personalization

Required

- ☐ Photo of you or your team
- ☐ [Company bio](#): write a paragraph intro to your customer for us to use on your “about us” page.
- ☐ Personal bio: write a paragraph intro to your customer for us to use on your “about us” page.

Optional

- ☐ Photo of you with a client
- ☐ Example photos from prior transactions
- ☐ Seller-focused introductory video: giving a broad overview of your company, how you help, and the buying process.
- ☐ Mission Statement - the “why” behind the business/what drives you beyond the transaction?
- ☐ Core Values - the primary beliefs or practices that inform your business. Anything else that can be used to further connect you to visitors coming to your site!



Localization

Required

- ☐ Identify your [main market](#) area and where you would like to grow in the next two years.

Optional

- ☐ Area images: that are either your own or find images from [depositphotos](#) (cannot be copyrighted or editorial only)
- ☐ Image of you with a local landmark or recognizable area --this can range from a nearby park, sporting event, restaurant, downtown, etc. Note: Additional photos can be submitted through a shared Google Drive folder if necessary.
- ☐ Any local or national organizations your company donates to.