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Stage 1A Setting Up A New Client



hubbix

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Stage 1A

Setting Up A New Client

In this guide, we'll be showing you how to set up a new client. Like everything with **hubbix**, this is a simple process and can be used to great effect when onboarding a new client. You'll need to ask for all this information at the beginning of the first session. It only takes a few minutes to fill in all the necessary details.

[Watch the Video](#)

1 Enter Client Info

- Start by clicking on the **Add Client** button on your **Client Dashboard** screen.
- Enter your client's information on the **Company Overview page**.

2 Select Business Goal

Select the main or primary goal the business is trying to achieve. Choose from the 5 options on the screen.

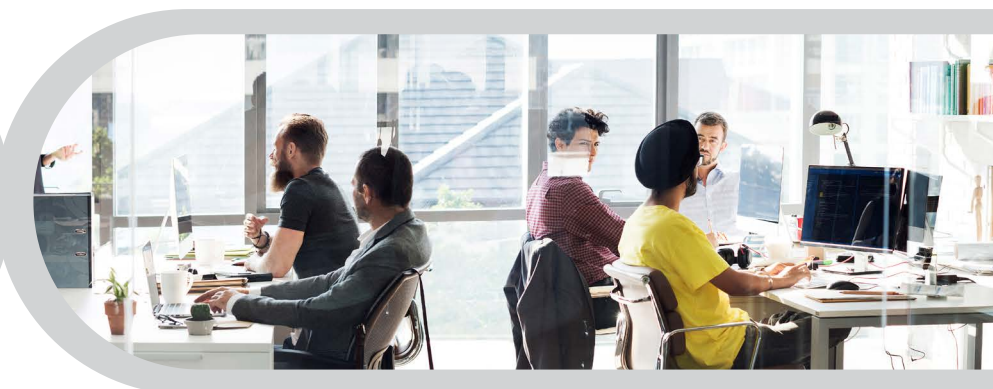
3 Enter Goal Specifics

- Go into more detail regarding the main goal and break it down into actionable chunks. (This is where you can make the goal SMART.)
- Type the goal specifications into the box, for example: "Win 5 new contracts for £1500 each, within 12 months."
- You can amend this information at any point in the **hubbix** process.

Organising Your Questions

Choose from the 3 options provided:

1. **Priority Order** – All questions and subsequent actions are organised from 'most important' to 'least important', based on the selected goal (step 2).
(This reveals the most urgent vulnerabilities early in the process, preventing future problems or issues).
2. **Custom Order** – You control which questions are asked and when. Select different sections and categories of questions in your preferred order. Actions are organised by the date they were created but can be reordered. (This gives you complete control of the **hubbix** process).
3. **System Order** – questions and actions are organised in the original **hubbix** sequence, from Sections 1 through 8. Actions can be re-organised at will.
(This option provides a thorough understanding of the client's business from an early stage.)



Setting Up A New Client – FAQs

● Does It Take Long To Set Up?

Not at all – you can get a client profile set up in less than 2 minutes!

● What If My Client Has More Than 1 Goal They Want To Achieve?

Not to worry, just enter the main goal (the goal with the highest priority) into the *Goal To Achieve* section. **hubbix** will address your client's additional goals as you progress through the platform.

● Do The Different Goals Mean Different Questions?

No, you will see all 1500 questions, no matter the goal you have selected. (The order in which the questions are presented changes with each goal. This is because some questions might be far more important in the early stages of the process.)

● Can I Change The Question Order?

You certainly can! When choosing the *Priority Order* (the order best suited to the goal), **hubbix** will automatically order the questions depending on the selected goal. You also have the option to choose *Custom Order* (you decide which questions are asked and when), or *System Order* (the original order).

● Can I Break The Main Goal Up Into Bullet Points Or Actionable Chunks?

Absolutely, that is what the *Goal Specifics* box is for, it helps add important details to the primary goal. You can return to the *Goal Specifics* at any point in the process to add or amend the information.

[How to Integrate Hubbix into Your Service Offering.](#)



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