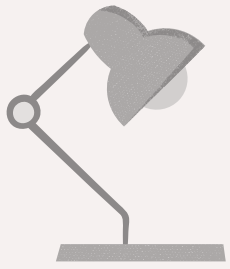


# How to onboard your clients \*

*in your sleep*

## FIRST, PREPARE YOUR:

- Brand assets
- Canned emails (all those emails you notice you're sending over and over again)
- Calendar available for new appointments (discovery call, kickoff meeting, strategy, feedback, handover)
- Contracts and subcontracts including client approvals/feedback requests.
- Briefing form/Initial form with all the information you and your team need to get started.
- Introduce your team to your client with a welcome email or package, a short Loom video is always fun!



What to do next? Dear Coach recommends using a CRM system so you can automate everything and your CRM system can do it for you in your sleep!

### FOLLOW UP

You send them a follow-up email (canned email #1) with a Discovery Call calendar created directly in your CRM System

### NEW LEAD

Your lead comes from your lead form on your website or SM channels.

### BOOKING REMINDER

After the client books, you send them a confirmation and a reminder an hour before the call (canned email #2).

## WELCOME

You're ready for the welcome email (canned email #4). You can introduce your team, send a kickoff meeting calendar or a strategy calendar invitation, and a brief form.

## DELIVERY

When the work is ready to be delivered, you can send a feedback calendar invite to discuss what you've been working on with your team (canned email #6)

Are you ready for your CRM system? Get started now and get 30% Off your first month or year!

## PROPOSAL

You're ready to make the proposal and you already have a template so you only need to add your package and pricing (prepare canned email #3). You can also connect your invoice and your contract so they have a three-step transaction: easy, fast, and efficient!

## START

After the brief form, you can have an automated email to your team so they can get started. (Canned email #5)

## HANDOVER

Handover email (canned email #7), and request feedback from your client.

USE DISCOUNT NOW!

