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!

NEW LEAD

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

FOLLOW UP

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

BOOKING REMINDER

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

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!

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.

START

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

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)

HANDOVER

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

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

USE DISCOUNT NOW!