20 Easy Steps to Onboard New Clients

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This incredibly easy step by step system has been created as a fail-safe process for each client you onboard from Discovery Call to First Session Call.

Using this process will instantly generate a full-proof connection with your client from every touch point in the onboarding process. From the outset it brings assurance and comfort to your clients and shows you as the authority making you make more money, keep more money and building excellent business systems with ease.

Process No	Process	Detail	Complete	Sent
DISCOVERY CALL SEQUENCE				
1	Client booked Discovery Call	Use a Automated Scheduling System (A.S.S) E.G. Calendly / Acuity Scheduling		
2	Confirmation sent to client	A.S.S Include: • Time, • Date, • Call link		
3	24 Hour reminder email	A.S.S		
4	1 hour reminder text / email	A.S.S		
5	Text alerts to you (The Coach)	A.S.S Suggested alerts: • Call Confirmation, • 1hour prior to call, • Cancelation	NA	NA
POST DISCOVERY CALL				
6	**Email 1**: Thank you email	Custom (manual)		
CONFIRMED CLIENT READY TO ONBOARD SEQUENCE				
7	**Email 2**: Congratulations and Welcome Email	Custom (manual)		
8		Invoice + Payment details		
9		Contract		
10	Full or Initial payment received	From client		
11	**Email 3**: Confirmation of payment & Discovery Pack email	Custom (manual)		
12		Discovery pack (optional)		
13		Initial worksheets (optional)		
14		Session time & date options (optional)		
15	Add to Email List	E.G. Mail Chimp / Active Campaign (optional)		
16	Set up lines of communication	E.G. Slack / Voxer (optional)		
17	Set up 1:1 session	E.G. Zoom / Google Calendar		
18	**Email 4:** 48hr before 1st call session	Manual (optional) Chase discovery pack		
19	First session reminder email	A.S.S		
20	**FIRST SESSION CALL**			