

The Ultimate Guide to Onboarding New

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Clients



Say Goodbye to Overwhelm and Hello to Increased Productivity!

Establishing expectations for your clients (and your team if you have one), keeping them in the loop every step of the way, while reducing questions and demands for your valuable time is key to your productivity as a small business owner.

That's why we've created this FREE client on-boarding checklist.

It will help you increase your productivity and ensure your on-boarding experience is seamless, confident, and impressive.

No more energy vampires hijacking your mojo (or your morning) because you're stuck in 'inbox overwhelm'. You'll have clear boundaries for managing clients outside of your inbox.

Imagine the confidence you'll have when you know with certainty that nothing is falling through the cracks!

LET'S GO.



The Checklist



- ☐ Do you have a simple system for potential clients to contact you and submit an inquiry? (i.e. contact form on website, clear button that says CONTACT, linked forms etc?)
- ☐ Do you have a personalized 'thank you' email that's triggered when someone requests more information?
- ☐ BONUS POINTS: Do you have a welcome series of emails written to nurture and educate your new leads that will be delivered automatically once they reach out for the first time?
- ☐ Do you have a clear button on your website where new leads can book a call on their own?
- ☐ Are you using an automated scheduling system so you can reserve your inbox for communication and not rescheduling multiple meetings?
- ☐ Do you have "starting at" prices listed on your website or on your contact form or a pricing guide download so that new leads won't have sticker shock when they discover your pricing?
- ☐ Do you have a "thank you" email template written to send new leads immediately after a chemistry call if they are NOT a good fit?
- ☐ Do you have a list of other contractors you can link to if you don't consider your new lead a "Good Fit"?
- ☐ Do you have an "OMG, I'm pumped" email template written to send new leads immediately after a chemistry call if they ARE a good fit?
- ☐ Do you have a proposal template ready to customize and deliver to your client within 24 hours of your chemistry call?
- ☐ Do you have an email template written to accompany your proposal?
- ☐ Do you have an email written to send to your new lead if you don't hear back after delivering your proposal?
- ☐ Do you have a second email written to send to your new lead 5 days after the proposal IF they still haven't booked a follow up OR accepted the proposal?

The Checklist



- ☐ Do you have an email written that you send to your clients once they say YES to your proposal?
- ☐ Do you have a policy in place to tell your clients how you'll communicate all important project details? (no loosey-goosey systems where they text you some info and email you other details).
- ☐ Have you set expectations with your clients on how frequently they can expect to hear from you as their project progresses?
- ☐ Have you given your clients specific examples of issues or topics that need to be communicated?
- ☐ Have you given your clients specific examples of issues or topics that DO NOT need to be communicated?
- ☐ Do you have a process for letting your clients know how you will respect their confidentiality?
- ☐ If your client has a concern, do they know the best way to address it with you?
- ☐ When do you tell your clients what your business hours are?
- ☐ Do you have a process for receiving feedback (good + bad)?
- ☐ Do you have a policy on scope creep?
- ☐ Do you have a policy on 'client no-shows' for scheduled appointments?
- ☐ Do you have a policy on overdue invoices?
- ☐ Do you have a policy on rescheduling?
- ☐ Do you have a policy on how you will handle a client who does not meet their own deadlines in getting information or decisions to you on time?
- ☐ Do you have a Pause Clause? (A policy on how long a project can be put on hold if your client needs to take a break).

The Checklist



- ☐ Do you make your client aware of the reinstatement fee if they need to enact their “Pause Clause”? (Yes, you can charge for this!)
- ☐ Do you communicate to your client at what point you will need to start from scratch if they’ve been on a break for too long?
- ☐ Do you have a policy outlining the length of time your proposals and quotes will remain valid?
- ☐ Do you dedicate time to understanding your client’s expectations?
- ☐ Do you have dedicated time to understand your client’s fears and concerns?
- ☐ Do you schedule time to talk with your clients about what would disappoint them?
- ☐ Do you take time to talk about best case scenarios if your project were to be wildly successful for them?
- ☐ Do you ask your clients what THEY need from you?
- ☐ Do you ask your clients what is the BEST way to give THEM feedback if you need to?
- ☐ Do you ask your clients what’s the best way to get them to re-engage if they go radio silent or otherwise disengage with you?
- ☐ Do you ask your clients who else they will be seeking feedback from BEFORE they make any decisions?
- ☐ Is it easy for your clients to sign your contract and pay you to make it official?
- ☐ Do all team members know how to access each client’s information? (If you have a support team.)
- ☐ Do you have a process for sending out a handwritten thank you note when your project kicks off?
- ☐ Do you send them a welcome kit with ALL these details explained?



At Activate Her Awesome, we know you want to streamline your business and increase your productivity.

Establishing expectations for your clients and your team, keeping them in the loop every step of the way, while reducing questions and demands for your valuable time, is key to this success.

When your clients know what's next, they'll be able to relax and enjoy their experience with you. They'll be impressed with your professionalism and attention to detail.

If you're wondering where you can make the time to write all these emails, develop these policies, and implement them with ease, I've got you.

You can purchase the Client On-Boarding Kit for 82% off using this link.

[**GET DETAILS**](#)