



T H E C L I E N T O N B O A R D I N G T E M P L A T E

Give Every Client a 5-Star Experience
(On Autopilot)

Welcome. Wow. Deliver.

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Why Onboarding Matters

First impressions set the tone. A systemized onboarding = confident clients, fewer questions, and a business that runs without you managing every detail.

GREAT ONBOARDING DOES 3 THINGS:

- Makes the client feel confident they made the right choice
- Sets clear expectations from day one
- Reduces your workload by answering questions before they're asked

The Onboarding Timeline

- **Day 0: Contract signed**
- **Day 1: Welcome email**
- **Day 3: Kickoff call**
- **Week 1: First deliverable**
- **Week 2: Check-in**
- **Month 1: Review**

PRE-ONBOARDING CHECKLIST

- Contract signed and filed
- Payment processed
- Welcome packet sent
- Access provisioned (tools, folders, channels)
- Kickoff call scheduled
- Internal team notified

THE WELCOME EMAIL TEMPLATE

CUSTOMIZE YOUR WELCOME

Subject line:

Opening (personal welcome):

What to expect in the first week:

How to reach us:

Next step / CTA:

THE KICKOFF CALL AGENDA

- Welcome & introductions (5 min)
- Their goals & expectations (10 min)
- Our process overview (10 min)
- Communication preferences (5 min)
- Immediate next steps (5 min)
- Questions (5 min)

COMMUNICATION FRAMEWORK

When to email: Non-urgent updates, documents, recaps

When to message: Quick questions, time-sensitive items

When to call: Complex discussions, sensitive topics

YOUR COMMUNICATION COMMITMENT

Our response time commitment:

Emergency contact method:

Regular check-in schedule:

YOUR ONBOARDING CHECKLIST

Customize for YOUR business:

BUILD YOUR ONBOARDING

Step 1:

Step 2:

Step 3:

Step 4:

Step 5:

Your Next Steps

TAKE THE DIAGNOSTIC

5 minutes to discover your primary zone and get personalized insights. Free.

[TAKE THE FREE DIAGNOSTIC →](#)

BOOK A STRATEGY SESSION

90 minutes to get crystal clear on your zone, your roadmap, and your next 90 days.

[BOOK YOUR SESSION →](#)



Hi, I'm Lauren!

Three years ago, my daughter asked her dad 'why is mom always working?' — and I was standing right there. That moment changed everything. Today I close my laptop at 4 PM every day, never miss Friday pickleball with my daughter, and help other CEO parents do the same. You can have profit AND presence. I'm proof.

profitandpresence.com

[@scalewithlauren](https://www.instagram.com/scalewithlauren)

[YouTube: @ProfitandPresenceCo](https://www.youtube.com/@ProfitandPresenceCo)

You can't skip zones. But you CAN move through them faster with the right support.