

CLIENT EXPERIENCE KICK OFF CHECKLIST

You just booked a client! HOORAY! Before you go jumping into your service, take the time to set your working relationship up for success with these 10 firsts! By kicking off your service with you in control, your client will feel well cared for and have appropriate expectations for what's to come.

Plus you'll have established important boundaries around your business so you can enjoy the life your business serves!

○ SEND A WELCOME EMAIL

As soon as things become contract official, send your brand new client a warm and welcoming email!

In this email, you don't want to bombard them with too much information all at once, but rather give them a friendly heads up on the first few steps to come in your service.

○ CUSTOMIZE THEIR WORKFLOW

You probably have a general workflow template that outlines your service (if not, let's start there!), but before your client ever sees a flow of events, you'll want to customize it to be tailored to their specific needs.

Make all your notes and schedule out any important dates so you are organized on the back end and fill in your client's name for any tasks they will complete.

○ CREATE THEIR PRIVATE PORTAL

Whether you use a free tool like *Trello* or a comprehensive CRM like *Honeybook*, creating a private space where your client can access any documents, important notes, and their customized workflow is well worth the time and investment. Setting up a private portal your client can log into also acts as a form of communication throughout the process! They will easily be able to tell when you have completed a task to know you are on it!

○ AUTOMATE THE DOLLA BILLS

It is your job to get paid. Not your client's job to remember! Do the heavy lifting when it comes to invoices and payment reminders. Right after booking, schedule in email reminders to automatically go out before a payment is due. (A CRM like *Honeybook* does this for you!)

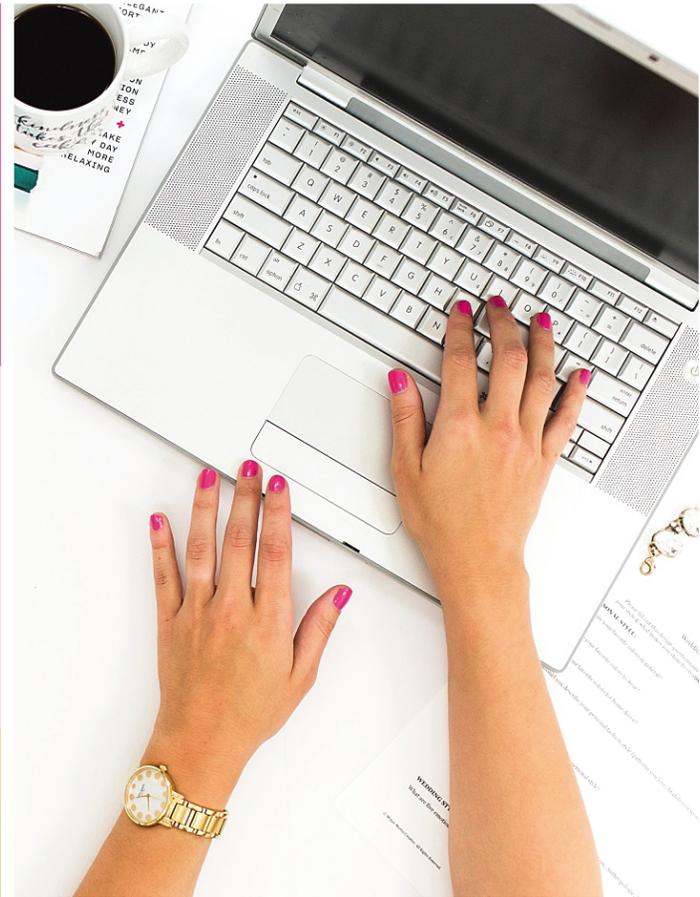
If you require payment by check, go the extra mile and send your client pre-addressed and stamped envelopes!

○ WRITE A THANK YOU NOTE

Your client could have chosen anyone, but they chose you.

That is BIG!

And well worth a hand written thank you note. I know an email is easier and faster, but there's just something special about getting a thoughtful hand written note card in the mail. They won't soon forget the gesture!



○ SEND YOUR OFFICE POLICIES

Sounds stuffy, but this is a critical step in the onboarding process you don't want to miss!

This one document will establish appropriate boundaries in your working relationship so that everyone understands how your time together will run.

Just think how nice it'll be to not get those 10:00pm texts!

○ SEND A PRETTY PRINTED TIMELINE

Turn their customized workflow into a pretty printable for them to have on hand. Although we are well into the digital age, many people still love to have important information in print.

You've already done the customization work, so pop it in the mail to show your client just how much care and attention you are giving them from day one!

○ GIVE THEM SOMETHING VALUABLE

In another gesture of gratitude, give them something of value right off the bat that they weren't expecting.

Think about what would be truly helpful for them. A guide that answers their most burning questions? A list of your go-to products that are complementary to your service? Or a list of your most trusted industry peers and vendors to work with? Think about how you can serve them well!

○ TIE IT WITH A BOW!

If you're going to send them a Thank You note, a copy of your Office Policies, a Pretty Printed Timeline, and something valuable, you might as well package them all up in an on-brand folder and tie it with a bow!

This Welcome Packet will act as something tangible your client can open to build excitement with surprise and delight!

○ BUILD ON THE EXCITEMENT

Schedule and automate future touch points to keep the excitement going as you continue to serve your client in your time together.

You can foster the fun through client gifts, special handwritten notes, or even featured social media shout outs to show the world how thrilled you are to have them as a customer!

