Stop repeating the same onboarding instructions

> *“Every time I sign a new client, I have to spend 20 minutes emailing them links, explaining what to expect, and answering the same basic questions.”*

Category: operations **Setup Time:** ~60 minutes **Estimated Hours Saved:** 3 hrs/week **Direct Software Cost:** $0 / month

SOLUTION SUMMARY

Create an automated welcome email sequence that triggers the moment a client is marked as 'Won' or pays their first invoice. A well-designed onboarding email delivers all the necessary links, sets clear expectations for communication, and proactively answers FAQs. This ensures every client gets a high-quality, consistent experience while completely removing the manual data entry from your plate.

REQUIRED TOOLS & DIRECT WHOLESALE UTILITIES

- **Zapier: (Free Tier / Wholesale)**
- **Mailchimp / ActiveCampaign: (paid)**
- **HoneyBook / Dubsado: (paid)**

STEP-BY-STEP APPLICATION INSTRUCTIONS

1. **Write the welcome email**
   Include a warm welcome, what happens next, required links (portals, forms), and communication boundaries.

2. **Set the trigger**
   In your CRM, configure the workflow to start when a contract is signed or an invoice is paid.

3. **Attach necessary files**
   If you have a welcome PDF or pricing guide, link it securely in the email.

4. **Test the flow**
   Add yourself as a test client, sign the contract, and verify the email arrives formatted correctly.

5-POINT QUALITY VERIFICATION PROTOCOL

[ ] **Carrier & Webhook Test:** Confirm webhook listener receives test payload and returns HTTP 200 within 500ms.
[ ] **End-to-End Simulation:** Execute live test event from personal device and verify SMS/email delivery.
[ ] **Anti-Spam & Rate Limit Check:** Verify repeated submissions do not trigger duplicate messages to clients.
[ ] **Direct Ownership Audit:** Confirm all API keys, accounts, and credentials belong directly to your practice.
[ ] **Staff Notification Verification:** Verify practice manager/receptionist receives real-time push alert with dial link.

FREQUENTLY ASKED QUESTIONS

Q: Should I send one long email or multiple short ones?

A: One clear, structured email with bullet points is best for day one. If you have a lot of content, spread it over a 3-day sequence.

Q: Can I schedule automated onboarding emails through Gmail or Google Workspace?

A: Gmail supports basic scheduled sending manually, but multi-day onboarding sequences require an automated email service like ActiveCampaign, Mailchimp, or Zapier webhooks.