CUSTOMER
ONBOARDING
MAGIC
WORKBOOK

FOR GRAPHIC & WEB DESIGNERS
& CREATIVE PROFESSIONALS

FREELANCE
ONFIRE

Getting Started

Thank you so much for downloading the Onboarding Magic Workbook.

Creating an onboarding process is as unique as you. The number one focus of the onboarding process is to help provide an amazing experience for your customer.

But, the other benefits of an onboarding process helps you minimize gaps and mistakes and allows you to focus on serving the client and getting them results. It also saves you a lot of valuable time, energy and resources by helping you (and your customer) to stay on track.

The process to creating your own personal onboarding process is simple. You can easily start with the steps and processes you're already using.

I want you to use the workbook like a project log.

Once you have an initial onboarding process in place, you'll be able to refine and enhance the process over time, perfecting it into a process that serves both you and your customer well.

So here's how it works.

You're going to brainstorm your last 1 or 2 projects you've completed. Using these projects as a guide, I want you to start to list all the actions you've taken, breaking the actions down into the four phases I outlined in the workshop.

- Pre-Sales Phase
- Sales Phase
- Production Phase
- After Care Phase

In the pages that follow, you will find a log sheet for the four different phases. I want you to use these logs as a starting point for defining your process.

As you move through each phase, I want you to write down as many details as you can. The list doesn't have to be perfect. We'll clean it up later. For now, just write down as many task as you can think of for each phase.

Here are some examples:
- make a phone call?
- send an email?
- set up a meeting?
- do client research?
- follow up with the client?
- setup files or folders?
- send the client information?
- ask client for information?
- send a proposal?
- send an invoice?

Once you have a list of the tasks, you can start to put them in logical order, sorting them into a timeline of sorts. Each task leads to another.

You'll see that many of your tasks will be manual. But some of the tasks are repetitive. Make note of the tasks that are the same from project to project. These task can be identified for possible automation.

Once you've created and sorted tasks for each phase, you've created version 1.0 of your customer onboarding process.

I'm excited for you. Your customers are going to love it and your business will too.

I wish you the best in business and in life!

Blessings,

Stage 1: Pre-Sales Phase

The Pre-Sales Phase is the time you spend getting to know a potential customer either through research, an intial consultations call or zoom session, or maybe even meeting someone through a network, online or in-person. Think of as many steps that you would take at this phase and mark the type of task it is (internal, email, phone, meeting and if you think this task can be automated)

List Key Action Steps:

	Internal Task	Email	Phone Call	Meeting	Automated

Stage 2: Sales Phase

The Sales Phase is where you will record all the tasks related to meetings, gathering project information and requirments, emails, phone calls and activity related to putting together a proposal for your customer and delivering and/or pitching it to them. What steps are needed to get the sale and prepare to start production?

List Key Action Steps:

	Internal Task	Email	Phone Call	Meeting	Automated

Stage 3: Production Phase

The Production Phase includes all the tasks related to starting, creating, finishing your customer's project. What steps are needed before you start production work? What steps are needed to get customer feedback or updates? What steps do you take to finalize and deliver the project and final invoice to the customer? List those steps here.

List Key Action Steps:	Internal Task	Email	Phone Call	Meeting	Automated

Stage 4: After Care Phase

What steps do you take after the customer has approved the project and you've been paid for your work? What follow up communication (email, newsletters, etc.) do you send to the customer post-project? Do you ask for referrals or inquire about additional projects? Do you have a follow-up plan to stay in touch with the customer over the course of the year? List those steps here.

List Key Action Steps:

	Internal Task	Email	Phone Call	Meeting	Automated