· CLIENT ONBOARDING ·

checklist

A WORKFLOW SYSTEM TO COMPLETE AFTER YOUR NEW CLIENT SIGNS THE DOTTED LINE

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PHOTOGRAPHY

congratulations!

You just booked a new client! Now what?

Feeling a little bit overwhelmed and afraid you might forget something while onboarding your new client? I completely understand.

The client onboarding process is a stressful, time consuming process. Since you don't do this task every day, it can feel like re-learning the system each and every time, ending up being an inefficient use of time.

By creating workflow templates (fancy words for a checklist of steps you follow each time you complete a task), you can create a positive experience for you and your client. Remember, this is a fluid system that can be improved every time you onboard a new client!

Here are some sample tasks to get you started on your own customized workflow:

- [ ] Create a contract and invoice
- [ ] Find a system for collecting payments (PayPal, Stripe, etc)
- [ ] Send a Welcome Email. Keep this short and friendly. Let them know the first few steps as a new client.
- [ ] Enter client information in Client Management Software (17Hats, Honeybook, etc)
- [ ] Automate the payment schedule. Schedule reminder emails to let clients know when payments are due. If you require check payments, go the extra mile and send your client pre-addressed and stamped envelopes.
- [ ] Create a project workflow for client and tailor the process to his/her specific needs.
- [ ] Send client access to necessary documents (via Google Drive, Dropbox, etc)
- [ ] Send client "How I Work" document outlining office hours, studio policies, communication guidelines, etc.
- [ ] Enter project events and deadlines into your work calendar.
- [ ] Send a handwritten thank you and a welcome packet. Some business choose to make a welcome packet of information and others send brand curated gift items.

A FEW MORE THINGS

- [ ] TEMPLATES ARE YOUR NEW BFF. You are wasting time and losing money if you write new welcome emails and "How I Work" documents every time you get a new client. Save yourself and start writing templates up front to reuse each time.

- [ ] STAY TRUE TO BRANDING & ADD A PERSONAL TOUCH. Your client chose you because of YOU. So make sure you stay consistent with your personal voice and branding all the way throughout the process. This will give clients a sense of security and take the overall presence of your business to the next level.

- [ ] TIPS FOR TESTIMONIALS. I've heard over and over again that clients will not write reviews. So instead of asking them to come up with something on their own (not everyone is an author), use a questionnaire to ask them specific questions about their experience with you. You will get better client participation and more focused feedback to use as social proof.

- [ ] GET THE RIGHT TOOLS. All of these client onboarding tasks will cost you time and money if you're not using the right business tools. Invest in systems like Honeybook or 17Hats to use for contracts, invoicing, client management, and project management.

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