



Extra resource for the original article
[How to Start Freelancing Successfully](#)

Step #4 of Building a Sustainable Freelance Business

ONBOARDING



These are templates for you to use within your onboarding process. Change them around to suit your business and your clients' businesses.

Onboarding will position you as an expert in your client's business and a professional in yours.

Please be sure to read the lesson on Onboarding.

Remember to change up this template to suit your business. I don't mind getting more clients, but I wouldn't want them to be yours ;).

"Title" is a suggested title for the email.

"Delay between emails" is a suggested amount of time to wait since the last email was sent.

There are things within this onboarding sequence that will benefit you in crafting better marketing material and content for your website. Pay close attention to those areas.

Ready? Awesome, let's get to it!

First Onboarding Template - Thanks and Welcome - this is pretty self explanatory, but the main objective here is to be gracious and let them know right from the start what to expect. Obviously this is a template, so certainly change accordingly and have some fun with it by adding your own spin and personality to it.

Title: Thanks for choosing me

Delay between emails: Immediately

Hi {{subscriber.first_name}}

Thank you for picking me to be your _____. I know there are plenty of options out there so I am honored you have chosen to work with me. I'm excited to get started.

I'll set you up within my systems and get you everything you'll need over the next several days. I'll also be sending you a couple of logins as well, so keep an eye out for that.

I love collaboration

This process is interactive. I'm here to help; that is what you hired me for. I will be open to hearing all of your thoughts and ideas. However I need you to participate in the process, be open to new ideas and information, and please be honest with all of your feedback and input.

I need you to read my emails

Over the next week, you'll receive information about the process, what you can expect, and even strategies to help you get the most out of your investment with me. I communicate primarily through email about your projects, including tasks I need you to do and things to send me.

I want you to "bug me"

If you need help or have questions, let me know! Don't worry about "bugging me". Whatever it is, don't suffer and try to get through it on your own. I'm here to help, and that means you can reach out and get help when you need it.

I'm looking forward to working with you. I have no doubt that we'll be able to take your business to that next level. Stay tuned over the next day or so for more updates.

Second Onboarding Template - Information for you - this is the first email that is homework for them that you need done.

Title: [Project] Information

Delay between emails: < 1 hour

Hi {{subscriber.first_name}}

This will be the first of several emails that you will receive. This one pertains to (your website, design, or whatever you are working on for them) .

[insert a list of items, (no more than 10 and shouldn't take more than 10 minutes to do in total) for them to do for you that is very specific]

Having all this information ensures that I can hit the ground running in working within your business and getting things in place to work on your website.

Third Onboarding Template - Information for them - since we asked them to do a number of things in the last email, let give something back to them in this one. In my process I explain the billing and any terms that I have.

Title: [Process] Information

Delay between emails: 1-2 hours

Hi {{subscriber.first_name}}

Since you've already paid for the (first time period/interval) , I just wanted to mention what will be happening over the course of the following (interval) .

As you know, I've set you up within my billing system and since you've settled up for the initial payment, I'm assuming that you were able to log into your account without issue. If not, please let me know.

On the (regularly set interval period) , you'll be receiving an invoice for _____ .

When you get that invoice on the (regularly set interval period) , there will be a link in there for you to go ahead and pay it.

At the time of your payment, you should have the option to have it automatically pulled on the (regularly set interval period) to make things easy moving forward. You would then be charged on the

(regularly set interval period) and receive a receipt upon payment.

You'll pay for the (set interval period) and should you choose to change services, by all means let me know X days prior to the (regularly set interval period) so I can make sure to make the adjustment before the invoice gets generated.

If you have any questions, please let me know.

Fourth Onboarding Template - More Information for them, but more of you - each of the first 3 emails have been one-sided in some way. Now's the opportunity to give something to them, but it's really explaining how you want them to communicate with you. By doing this, right away they know how you work, how they will get tasks to you, and most important how the work will get done. I have 2 emails about this, but I've removed some of my personality and combined them into one for you to use.

Title: [Process] Information

Delay between emails: 1 day

Hi {{subscriber.first_name}}

Email

If you recall during our call I mentioned that you should use email in order to communicate with me about any tasks, projects, and aspects pertaining to the website. I do this to make sure that anything you send me is properly tracked and accounted for to make sure that nothing falls through the cracks.

Anytime you send an email, it'll create a ticket for us to track. I would love for you to go ahead and please send an email to make sure that there's no issues. I will reply via there to confirm that it's working.

Phone Calls

I also mentioned that we'll be having regularly scheduled Scrum Calls each week (~15-30 minutes). Here's a link that will place the call on my calendar. Please pick a time that works best for you.

This time will be yours each and every week. After you choose it, I will create a recurring call at that time and send you a call invite for it.

I know that things will come up from time to time and we can move it to another time. However moving forward this will be our time to chat.

"Office Hours"

I do have specific office hours from X am - X pm. I enjoy spending time with my family and friends. I do respect your time and I hope that you can respect mine as well. During the off times, please don't expect a call from me or even an email. I may send an email from time to time, but it's not guaranteed. I guarantee though that you will not get any phone calls after hours.

Obviously if there's an emergency during off hours, I will address it accordingly. An emergency consists of your website being offline or your checkout process is not taking payments.

Fifth Onboarding Template - Time to take their temperature, for them - each of the first 4 emails are heavy in process, expectation, and instruction. Now's the time to make sure that everything is clear and understood.

Title: [Just touching base](#)

Delay between emails: [2 days](#)

Hi {{subscriber.first_name}}

I wanted to find out if there's anything that you want ask me now that we've started working together? Just reply to this email and I'll be more than happy to answer.

Sixth Onboarding Template - Get the trigger that sealed the deal, for your own knowledge - now that you've been working together for a few weeks, there's obviously a rapport, and hopefully a good one. Time to find out why they hired you specifically so you can be sure to address it. Maybe the best tip from this is that you are getting your marketing material in their language.

Title: [One quick question...](#)

Delay between emails: [1 day](#)

Hi {{subscriber.first_name}}

I built this service to help businesses grow, and together we can achieve that for your business.

Since my last email was about you asking me something, if you wouldn't mind, I'd love it if you answered one quick question: **Why did you sign up?**

I'm asking because knowing what made you sign up is really helpful for me in making sure that I'm delivering on what you want. Just hit "reply" and let me know.

Seventh Onboarding Template - Time to take their temperature again, for them - now that you are almost complete with the first period of time, we want to make sure that we are moving the needle for them. It's also a gentle reminder and nudge if they didn't respond to the last email.

Title: [How's it going?](#)

Delay between emails: [10 days](#)

Hi {{subscriber.first_name}}

Since you are almost through your first month, I wanted to touch base and see if there's anything you have questions, concerns, or feedback on. Just reply to this email, I'm curious as to your thoughts.

Last Onboarding Template - Let's get that testimonial, for you - now that you have completed that first period of work and into the next, we want to capitalize on the initial emotions of working together and moving that needle for them. Let's see if we can get a testimonial. However this also serves to address any hiccups within that first period of time in working together so that moving forward the relationship only gets better. You'll definitely want to change this according to your own service and questions you want answered.

Title: [Your thoughts](#)

Delay between emails: [20 days](#)

Hi {{subscriber.first_name}}

Just wanted to follow up and make sure that everything is good to go. If there's anything that I can do outside of the tasks and tickets, please let me know.

Also, if you have a spare few minutes (*I know, "spare? what's that" - haha*), I was wondering if you could give me some focused and candid feedback.

I read each of these with great consideration and care. I strive to provide a great value to all my clients and this is a big part of that process. Since I know these sorts of things can have some pretty broad strokes, I've outlined some possible items here to simplify things a bit.

Reliability

What are your thoughts on my reliability if this one in particular speaks to you? Was I there for you in your time of need to help save the day? Do I always get things done on time and to your satisfaction?

Expertise

How about my expertise? How has knowledge of _____ and _____ helped your business? Have I been able to develop unique or creative solutions to your problems that you hadn't considered?

Customer Service

How do you like working with me? Am I easy to talk to? Do I feel like a part of your team? Do I respond in a timely matter and treat you like a VIP? How does this compare to other _____ you may have worked with in the past, if applicable?

Other

In a nutshell, why have you decided to continue working with me? Anything else that you would like to get off your chest?

Thanks in advance, I really do appreciate your time and your thoughts.