

AUTOMATE YOUR CLIENT ONBOARDING

YOUR CURRENT SYSTEM

Sales doesn't have to be a bad word. It's all about how you show up.

- ☐ Define your business model
- ☐ Draw out your current delivery system

AUTOMATING YOUR SYSTEM

Automating your delivery will let you grow your business.

- ☐ Define where you would hire or outsource (People)
- ☐ Define what tools you'd like to use for automation at each step (Tools)

YOUR IDEAL SYSTEM

Draw out your step-by-step process so you can duplicate it, providing the highest level of service to all your clients.

- ☐ Define your packaging steps
- ☐ Define your packaging tasks
- ☐ Define your packaging email templates
- ☐ Define your shipping steps
- ☐ Define your shipping tasks
- ☐ Define your shipping email templates
- ☐ Define your onboarding steps
- ☐ Define your onboarding tasks
- ☐ Define your onboarding email templates