Sales & Onboarding Checklist

What templates to use at each stage of your client's sales and onboarding journey

STAGE	DESCRIPTION	DOCUMENTS
Pre-Sale	Initial information that you provide to a contact or job lead to give them a snapshot of what you can do for them. Goal is to provide them with enough information so that they want to find out more about you	• Professional Profile • Cover email / letter
Sales Call / Meeting / Discovery Call	This is where you • Build rapport • Find out what services they need • Let them know what you can do • Brainstorm with them (add value from the word go) • Let them know your price (and be negotiable if you need to be)	• Client Onboarding Brief (*you fill out for your records*) Important to follow up this meeting with a short, friendly email thanking them for their time etc
Sales Confirmation	Client confirms they want to get started	• Service Agreement • Guarantee (if you choose to – or you can include it as part of your **Welcome Pack**) You might also want to send out your completed **Client Onboarding Brief** to confirm you have captured all the relevant information / see if there's anything you have missed
Post Sale	A great way to 'wow' your client with something different / unexpected, and it can also serve to confirm everything you've outlined up until now about how you work, *but in a printed form*.	• Welcome Pack and / or • Promotional Card