NEW CLIENT INTAKE SYSTEM FOR PRIVATE COACHING CLIENTS
LAST REVIEWED: APRIL 14, 2013

Purpose

This process outlines the new private coaching client intake system.

Assumptions

- This document assumes:
  - the person completing this system has been given passwords to all software and websites necessary via LastPass
  - the person completing this system has been given basic training on products, services, and procedures
  - Tiffany will be completing all steps
  - a ★ following a step denotes a step that will be completed by a VA when one is hired

- Client hires Tiffany
- Email client using *welcome* email template, thanking her for the opportunity to work with her, & asking her to be on the lookout for a second email containing her contract★
- **Update private coaching template contract in EchoSign**★
- **Send updated contract to client via EchoSign**★
- **Create digital client file in TeamWorkPM**★
- **Once signed contract is received, file contract in client's TeamWorkPM file**★
- **Once signed contract is filed to client project, a handwritten thank you card is sent by Tiffany**
- **Create client profile in Freshbooks**★
- **Prepare client invoice in TeamWorkPM**★
- If invoice has been paid:
    - **Mark invoice as completed**★
    - **Enter client's birthday and her daughter's birthday into the gifts calendar in Google Calendar**★
    - **If client was referred, send handwritten thank you postcard to referrer**
    - **Send welcome kit**★
    - **Call client to welcome her, let her know her welcome kit has been sent, and let her know to expect an email containing the call scheduling link soon**
- If invoice has not been paid:
    - Send *invoice reminder* email template★
    - Resend invoice via FreshBooks★
    - If client has not paid after one reminder, follow *Termination of Services due to Non-payment* system★
- Send *ready to get started* email template, which contains ScheduleOnce link★
- Client schedules first call & work commences
- Upon term completion, client can hire Tiffany for another term {follow *Veteran Client/New PC Term* system}★ OR
- Client can end services {follow *End of Initial PC Term* system}★

Client hires Tiffany	- After talking with the client via email, complementary call, etc., the client has decided to hire me Tiffany for private coaching service.

Thank client & prepare contract	- Email client using welcome email template, thanking her for the opportunity to work with her, & asking her to be on the lookout for a second email containing her contract★
	- Update contract in EchoSign with the terms and information specific to the client:★
	  o Name
	  o Contract term {months}
	  o Cost

Send contract	- Once the contract is updated, email it to client, via EchoSign, using the following options:★
	  o eSignature
	  o I need to add my signature to this document
	  o Change order to *I sign first, then recipients sign last*

Create client file	- Create client file in TeamworkPM★
	  o From the dashboard, select *Add project*
	  o Name the project as *Client Name {PC}*
	  o Below project name, complete the extra tabs:
	    ▪ Do not enter a description
	    ▪ Do not assign project to a client
	    ▪ Make sure all features **except** *Risk register* are on
	    ▪ Select *more*
	    ▪ Assign project to *Private client* category

	▪ Enter date contract was signed as *Project Start Date* ▪ Enter date contract ends as *Estimated End Date* o Click *Add project*
File contract	• Once signed contract is received, file contract in client's TeamWorkPM file* o Save contract file to desktop from EchoSign email o Select *Files* from client's TeamWorkPM project dashboard o Click *Post the first file for this project* o Browse and select contract file previously saved to desktop o Under *Options* select *Client contracts* category, do not notify anyone via email, and set privacy to *Everyone on this project* o No description or advanced settings o Click *Upload these files*
Send thank you card	• Once signed contract is received and filed to client project, a handwritten thank you card is sent by Tiffany o Select card from greeting card file in file cabinet o Include a handwritten note to client o Send thank you card within two days of receiving contract
Send invoice	• Log into Freshbooks to create client profile* o Select *People* from the menu at the top o Click *New Client* ▪ Under *Organization:*

	• No *Organization Name* • Send invoice by *Email* ▪ Enter client's *Email Address, Phone, & Name* under *Contacts* ▪ Do not assign login credentials ▪ Add address under *Details* ▪ Click *Save* Prepare client invoice in TeamWorkPM o Select *Billing* from client's TeamWorkPM project dashboard o Select *Add invoice* ▪ Number initial client invoice as invoice 1 ▪ Today's date as *Issue Date* ▪ *USD* currency ▪ *Invoice Pricing* is *Invoice is a fixed price* ▪ *Final Price* is cost listed in contract ▪ On *Optional* tab, enter *Initial client invoice* in *Notes* section ▪ Select *Add Invoice* o Invoice will be listed on the left side of the dashboard screen o Select the invoice & then click *Export Invoice* at the bottom of the screen o Select *Export to Freshbooks* and click *Export* o Find the client's name in the dropdown and click *Export Invoice to Freshbooks* o In FreshBooks, select *Invoices* from the menu at the top ▪ The invoice just exported will be in *Draft* status

	▪ Select the invoice by clicking on the invoice number ▪ Select the arrow next to *Send* & select *Send by email* ▪ The message to be sent with the invoice has already been programmed in, so select *Send*
Has invoice been paid?	
Yes	
Record client details	Select *Billing* on the client's TeamWorkPM dashboard★ o Select the outstanding invoice on the left o Click *Mark Complete* at the bottom o Click *Yes, mark as complete*
Enter info into gifts calendar	Enter client's birthday and her daughter's birthday into the gifts calendar in Google Calendar★
Thank referrer	If client was referred, send handwritten thank you postcard to referrer
Send welcome kit & call client	Send client welcome kit via email★ Call client to welcome her, let her know her welcome kit has been sent, and let her know to expect an email containing the call scheduling link soon
No	
Send reminder	Send invoice reminder template via email★

Resend invoice	• Resend invoice★ o In FreshBooks, select *Invoices* from the menu at the top o Select the invoice by clicking on the invoice number o Select the arrow next to *Send* & select *Send by email* o The message to be sent with the invoice has already been programmed in, so select *Send* • If client has not paid after one reminder, follow *Termination of Services due to Non-payment* system★
Send ScheduleOnce link	• Send *ready to get started* email template ★ o ScheduleOnce link is already programmed in
Work commences	• Client schedules her first call & work commences
Once term is fulfilled:	
Hire for another term	• Upon term completion, client can hire Tiffany for another term • Follow *Veteran Client/New PC Term* system★
Services end	• Follow *End of Initial PC Term* system★