

THE ZERO-TOUCH ONBOARDING TIMELINE

The Client Onboarding Blueprint

A client's first week decides whether they stay, refer, and pay on time. Here's a day-by-day onboarding that feels white-glove to the client — while running almost entirely on autopilot. **AUTO** = automatable today.

HUMAN = keep a person on it.

01 The timeline

Minute 0**Contract signed** **AUTO**

E-sign completes → welcome email fires instantly with what happens next. Speed here sets the tone for everything.

Minute 5**Workspace created** **AUTO**

Project folders, shared drive, client record, and internal channels — created from a template, named consistently, access granted.

Hour 1**Intake form sent** **AUTO**

One structured form collects everything (brand assets, logins, contacts, goals) — instead of 15 back-and-forth emails. Answers file themselves into the workspace.

Day 1**Kickoff scheduled** **AUTO**

Booking link in the welcome email; the calendar hold, agenda, and reminders handle themselves.

Day 2-3**Kickoff call** **HUMAN**

The one moment that must be human. You arrive with their intake answers already reviewed — which the client reads as "these people are on it."

Day 4**Plan delivered** **HUMAN**

Scope, timeline, and first milestones — from a template, personalized in 20 minutes, sent automatically once approved.

Day 7**First check-in** **AUTO**

"How's the first week feeling?" email fires automatically. Any reply routes straight to the account owner.

Satisfaction pulse + internal review task created. Catch wobbles at day 30, not at renewal.

02 Readiness checklist

Check what you already have — the gaps are your onboarding project list.

- ☐ A written welcome email template (not composed fresh each time)
- ☐ E-signature tool connected to whatever creates the client record
- ☐ One intake form replacing the "can you also send..." email chain
- ☐ Folder/workspace template that clones per client
- ☐ Self-serve kickoff booking link
- ☐ Automated day-7 and day-30 check-in messages
- ☐ Someone who sees every reply (automation delivers, humans respond)

Want your onboarding to run like this?

We build zero-touch onboarding around your tools in 2-4 weeks. Book a free 30-minute call — bring your current process, we'll map the automated version live.

[Book a free call →](#)