Note: This document is “view only”. Please create a copy of this document and save it to your drive.

**SN Template (Email) - {Client Intake} Getting Down to Business Planner // link to set up call - Systems Vault**

Hey [First Name],

Woot woot! My team and I are looking forward to getting started...

Next Steps:

1. Fill out the Getting Down to Business Planner [here](http://www.sarahnoked.com/gdtb-planner/). This will serve as a starting point for our discussion in your GDTB call.

2. Collaborate with us in Teamwork PM. You'll receive an invite shortly to collaborate with us :) And because you know I am a huge fan of SOPs (Standard Operating Procedures) [we even have one for using Teamwork PM](https://drive.google.com/a/sarahnoked.com/file/d/0B0CrfSaRu5tyeDh0ODFIb0E4MWs/view?usp=sharing).

Alternatively, please invite us to your Project Management tool.

3. If you haven't yet, please be sure to fill out our **OBM Services Contract,** which you received via email after our Discovery Call.

4. If you haven't yet, book a Getting Down to Business Session with us [here](https://www.sarahnoked.com/online-scheduler-getting-down-to-business/)

and be sure to fill out your Getting Down to Business Planner at least 24 hours prior to our call.

\*\***Please be sure to schedule in that call using the calendar of your dedicated OBM, which you received in your proposal. \*\***

5. Start sharing passwords via Lastpass with [**passwords@sarahnoked.com**](mailto:passwords@sarahnoked.com)**.** If you're not sure what you need to share with us, [here is a list](https://drive.google.com/file/d/0B0ImtcKvH65UQklUMkpMR25Xak0/view).

6. Create a Google Drive folder in the Google account of your choosing titled **(YOUR NAME - Shared with Sarah Noked OBM)**, and share the folder (with editing permissions) with xxx@sarahnoked.com // xxx@sarahnoked.com // xxx@sarahnoked.com. This is where all of our collaboration will be taking place moving forward, but it's important that you create the folder -- we want you to retain ownership of everything created in it! :)

Feel free to reply to this email with any questions you may have.

Speak soon!

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Your Signature