

Title: Automate Your Freelance Client Onboarding in 5 Minutes

Why Automate Your Onboarding?

- Save 10+ hours weekly
- Avoid manual errors
- Impress clients with professionalism

Step-by-Step Setup with VION

1. Download and open the Notion template.
2. Customize intake forms to your services.
3. Link contracts auto-generation via VION backend (coming soon).
4. Set timelines and reminders.

Using the Notion Template

- Track client info in one place.
- Automate follow-ups with simple integrations.
- Visualize project milestones.

Onboarding Automation Checklist

- Collect client info upfront
- Auto-send contracts
- Schedule milestones
- Set reminder triggers

Quick Tips

- Use clear client instructions.
- Personalize contracts automatically.
- Leverage email sequences to nurture clients.

Start automating your freelance onboarding today with VION!