Onboarding & Offboarding

Unfortunately, once the deal is closed to work with you, we cannot go straight into the work.

The human mind craves clarity and order. Information and next steps need to be made clear if you want this to flow smoothly.

Onboarding is the process of getting clients or customers up to speed on what to expect.

Offboarding is the process of making sure there are no loose ends.

This is applicable to any form of transaction, not just consulting or higher ticket offers.

In the last module of the Masters curriculum we will discuss the "buyers journey" and how to automate a lot of this process, especially with digital products.

As always, it is better to get hands on experience with this process so you can then automate it with your direct situation in mind. I would not recommend blowing this off and going straight for the automated versions. Understand the intimate connection that you have to maintain with your customers while you are just starting this process.

Onboarding Emails, Kickoff Calls, & Questionnaires

There are a few aspects of onboarding that we need to take into account.

This step comes *after* you have closed them as a client. That means they have paid. Once they have paid, you will send them an email with clear steps on what to expect.

for a consulting offer, this looks something like:

- Thanking them for their trust and confidence in your service
- A link to schedule their first call with you
- A link to fill out a questionnaire that has questions to help you do your job better (for a fitness coach, that would be their current weight, height, etc etc. You understand what information you need more than I do).

- A link to join a mode of communication (Discord, Slack, Telegram, or even personal number)
- A like to gain access to a membership / client dashboard (this is where you will eventually host a curriculum or whatever is necessary to fulfill your service)
- A call to action to reply with any questions they have so far
- Any other step necessary to gain clarity on whats next

While this isn't absolutely necessary at the start, I would highly recommend having a minimal email to send out so people receive something after paying you.

Since you will be having people pay on the call, you can tell them next steps that would be included in an onboarding email right there, or just send them a DM. But it's good to provide that clarity in a streamlined fashion.

The purpose of creating this onboarding system is to prevent unnecessary back and forth. If you didn't create an onboarding email, you would learn by trial and error anyways, forcing you to create one if you want to stop answering repeat questions and increase the quality of your service.

Kick Off Calls & Questionnaires

At the start, I would recommend starting your first call as a kick off call, not a consulting call. This would be to get the required information you need to work with them best.

For a web designer, there are specific things that you need to know to do your job best, like brand colors, the logo file, images and assets they want on the website, competitor websites that will help with inspiration, and the rest.

For a performance coach, it may be things like a detailed look into their current lifestyle, struggles they are facing, and other things that will help you tailor the experience.

For a Twitter ghostwriter, it may be their tone, mentors, domain of mastery, topics, links to their offers for promotions, and everything else included in this cohort.

That's another thing and a reason to buy courses and books related to the things you want to sell. Not for the information inside, but for the structure and how they provide the information. This will also be crucial for when we create a project. Intelligent Imitation in all domains.

Over time, you will know what questions you need to ask. Problems will come up from things you didn't take into account the first time around.

You can eventually house all of this information in another questionnaire with something like Google forms and attach it to your onboarding email for them to fill out.

Offboarding Call, Email, and Testimonial

Offboarding is uncommon but can be as simple as you make it.

You should either schedule a call with them to wrap up loose ends, figure out what you could do better, give them guidance on what to do next, and potentially ask for a testimonial.

This will become more clear in future modules.

As I said, all of this is holistic. The process of getting traffic to your offers, acquiring customers, and nurturing them is all the same — different offers differ in how this process is actually executed.

Previous Lesson:
Conversational Sales Call

Next Lesson:
Your Education System

Action Steps

Module 7
Making A Living Without Followers
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The Sales Process