

Client Onboarding Operations Checklist

This checklist ensures smooth onboarding for new StayMate clients. Follow these steps for each new client to minimize errors and reduce setup time.

1. Intake Form

- Send client the onboarding form.
- Review responses (property details, listing link, email forwarding setup).
- Time estimate: ~5 minutes.

2. Zap Pack Duplication

- Duplicate master Zap Pack.
- Update Google Sheets row with client's info.
- Relink Zap fields to new row.
- Time estimate: ~15–20 minutes.

3. Email Connection

- Preferred: Add client's property under StayMate cohost inbox (fastest).
- Alternative: Authenticate client's Gmail in Zapier (10–15 minutes).
- Confirm test email is visible in Zapier.

4. Testing

- Send dummy booking/inquiry/cancellation email to inbox.
- Run Zap test → confirm Sheets + AI response populate correctly.
- Resolve formatting or regex mismatches.
- Time estimate: ~10 minutes.

5. Client Handoff

- Send client confirmation (screenshot of test record in Google Sheets).
- Explain automation is live and requires no manual input.
- Time estimate: ~5 minutes.

6. Scaling Tips

- Batch onboarding steps for multiple clients in one block of time.
- Encourage cohost inbox model to reduce setup overhead.
- Standardize regex + Sheets headers for all clients.