

CLIENT ONBOARDING · START HERE

Your Next Client’s Welcome Pack

A clear first step for the paying client you are about to welcome.

Use this pack to prepare one welcome email, a short preparation sheet and a coach-only readiness record. Add the logistics form only when something essential is missing.

Start with the agreement you already use

This is for online coaches with a defined service and a new adult client. Have your actual offer, session details, contact route and existing agreement, policy and payment process to hand. This pack does not replace a coaching agreement or create new terms.

If a required agreement, payment arrangement or key session detail is unresolved: keep the client’s readiness status pending and settle that item through your normal process before confirming readiness.

Gather these facts once

Fact	Use your actual information
Offer and format	Service name, online format and session duration
Session state	Already booked with date, time and named time zone; or a working booking route
Links and help	Joining link, preparation location and monitored logistics contact
Existing commitments	Agreement/policy location and the real payment prerequisite
Preparation	Only what the client genuinely needs before the first session

In the files: editable DOCX templates, this guide and an optional ChatGPT prompt in a plain-text file. Use your existing email and document app. No new platform or AI subscription is required.

01 · COPY AND CUSTOMIZE

Choose one welcome email

Replace every [BRACKETED FIELD]. Choose the email that matches reality. Use an attachment name instead of a document link if you prefer. Remove the reference sentence if those documents do not contain that information; point to the correct existing location.

A The first session is already booked

Subject: Your [OFFER_NAME] welcome and first session

Hi [CLIENT_FIRST_NAME],

Welcome to [OFFER_NAME]. Our first [SESSION_FORMAT] session is on [DATE] at [TIME] [TIME_ZONE] and lasts [DURATION].

Join here: [JOIN_LINK]

Your next step is to read your first-session preparation sheet: [PREP_SHEET_LINK_OR_ATTACHMENT_NAME]. It explains what to bring and how to get help.

For reference, your existing agreed documents are here: [AGREEMENT_AND_POLICY_LOCATION]. Your payment arrangements and session-change policy remain as agreed there.

If you have a logistics question or a link does not open, contact [COACH_CONTACT].

[COACH_NAME]

B The client still needs to choose a time

Subject: Choose your first [OFFER_NAME] session

Hi [CLIENT_FIRST_NAME],

Welcome to [OFFER_NAME]. Our sessions take place [SESSION_FORMAT] and last [DURATION].

Your next step is to choose your first session here: [BOOKING_LINK]. Check the displayed time zone before confirming.

Once your time is confirmed, I will send your joining details and first-session preparation sheet.

For reference, your existing agreed documents are here: [AGREEMENT_AND_POLICY_LOCATION]. Your payment arrangements and session-change policy remain as agreed there.

If you need help choosing a time, contact [COACH_CONTACT].

[COACH_NAME]

No booking page? Replace that action with your real scheduling process, such as replying with two suitable times and a named time zone. Do not say a session is booked until both of you have confirmed it.

02 · CLIENT FACING TEMPLATES

Keep preparation light

Send the preparation sheet once the session is booked. Copy only the logistics questions you still need. Keep the two pieces separate so the client can see what requires a reply.

First session preparation sheet

Your session: [DATE] at [TIME] [TIME_ZONE] · [DURATION] · [SESSION_FORMAT]

Join: [JOIN_LINK]

Before we meet: [YOUR_ACTUAL_PREPARATION_INSTRUCTION]

What to have ready: [MATERIALS_YOU_GENUINELY_REQUIRE_OR_NONE]

Your role: Bring the topic you want to work on and ask if the process is unclear.

My role: Guide the conversation using our agreed coaching process.

Change of plans: Use [EXISTING_RESCHEDULE_ROUTE]. The policy we agreed is in [POLICY_LOCATION].

Questions or link trouble: [COACH_CONTACT]

Optional reflection, if it suits your process: “Think about one question or situation you would like to explore. Keep your notes private and bring what you are comfortable discussing. You do not need to email personal details.”

Review the role statements against your actual coaching process. Delete anything you do not require; do not add homework or response-time promises by default.

Missing logistics form

“Please reply to [COACH_CONTACT] with only the unanswered items below. Skip anything I already have. Keep this to practical arrangements; do not include health information, personal history or confidential coaching notes.”

1. Preferred name, if I do not already have it: [ANSWER]
2. Best email for session logistics, only if different from our current email thread: [ANSWER]
3. Your time zone, if not already confirmed (city or named zone): [ANSWER]
4. Can you open the booking or joining link? [YES / NO / NOT RECEIVED]
5. Optional logistics question about scheduling or using the meeting link: [ANSWER]

“If you need an individual adjustment to take part, contact me privately through [COACH_CONTACT]. You do not need to give a diagnosis in this form.”

Coach note: Delete all answered questions. If no logistics are missing, do not send the form. Specialized intake needs belong in your own appropriate process.

03 · FOR YOUR EYES ONLY

Track first session readiness

Keep this record in your own private document or task list. Use a client reference rather than personal session details. Marketing PMP does not need your completed record.

Client reference: [REFERENCE] **First session:** [DATE + TIME + TIME_ZONE]

Overall status: [PENDING / READY] **Last checked:** [DATE]

Check	Owner	Complete when
Agreement and policies	Coach	Confirm the existing agreement and relevant policies are settled.
Payment arrangements	Coach	Check the actual prerequisite in your usual payment process. Record status only.
Time and attendance	Coach + client	Confirm date, time, time zone, format and duration.
Access and preparation	Coach	Test client access; share only the preparation actually needed.
Missing logistics	Client, if needed	Answer only unanswered logistics questions; coach resolves issues.
Final readiness	Coach	Check required items are complete; record remaining actions and owner.

Record any unfinished item

Item: [WHAT IS MISSING]

Status: [PENDING / UNCONFIRMED]

Owner: [PERSON]

Next action: [SPECIFIC ACTION]

Follow up on: [A DATE THAT FITS YOUR ACTUAL PROCESS]

What counts as ready

Mark READY only when your genuine prerequisites are met, the session details are confirmed, the client can find the joining instructions and any essential unanswered logistics are resolved. Sending the email alone does not make the client ready.

If something changes: update the session facts in one master place, then correct the email, preparation sheet and calendar details that rely on them. Use the existing agreed route for changes; do not invent a new deadline or fee.

04 · FULLY WORKED FICTIONAL EXAMPLE

A booked career coaching session

Fictional example. Maya Reed coaches adults moving into their first management role. Jordan has purchased the agreed one-to-one engagement. The agreement and the payment prerequisite are complete. These are example facts, not a testimonial or an outcome claim.

Session: Thursday 12 November 2026, 2:00–2:50 pm America/New_York (EST, UTC–05:00), online video.

Main action: read the attached preparation sheet.

Known logistics: Jordan's preferred name, email and time zone are already confirmed.

The completed welcome email

Subject: Your First Manager Coaching welcome and first session

Hi Jordan,

Welcome to First Manager Coaching. Our first online video session is on Thursday 12 November 2026 at 2:00 pm America/New_York (EST, UTC–05:00) and lasts 50 minutes.

Join here: <https://example.com/jordan-session>

Your next step is to read the attached First Session Preparation.pdf. It explains what to bring and how to get help.

For reference, your existing agreed documents are here: <https://example.com/jordan-agreement>. Your payment arrangements and session-change policy remain as agreed there.

If you have a logistics question or a link does not open, email hello@mayareed.example.

Maya Reed

Why this is enough

The email gives one primary action and makes the session time, joining route and contact easy to find. It does not ask Jordan to repeat information Maya already has. The preparation sheet on the next page completes the package.

Example addresses only: example.com and mayareed.example are illustrative, non-operational destinations for this fictional coach. Replace them with your own real links and contact route. No cancellation, refund or confidentiality terms are created by this example.

04 · FICTIONAL EXAMPLE CONTINUED

Preparation and the coach record

Jordan's completed preparation sheet

Your session: Thursday 12 November 2026, 2:00–2:50 pm America/New_York (EST, UTC–05:00), online video.

Join: <https://example.com/jordan-session>

Before we meet: Think about one question you would like to explore about being a first-time manager. You can keep your notes private; there is no need to email personal details.

What to have ready: A way to take notes, if you want. Check that your audio and the joining link work.

Your role: Bring the topic you want to work on and ask if the process is unclear.

My role: Guide the conversation using our agreed coaching process.

Change of plans: Email hello@mayareed.example using the session-change process in our agreement at <https://example.com/jordan-agreement>.

Questions or link trouble: hello@mayareed.example

The logistics decision

Maya already has the required logistics and Jordan has confirmed the link opens. She sends no extra intake form. If access were unconfirmed, the only question needed would be: “Can you open the joining link?”

Maya's completed internal record

Client reference: J-014 **Checked:** 10 November 2026

Session: 12 November, 2:00 pm America/New_York **Status:** READY

Check	Status and evidence in this fictional example
Agreement and payment	Complete. Maya checked both in her usual records.
Session and time zone	Confirmed with Jordan; video session is 50 minutes.
Welcome and preparation	Sent; Jordan confirmed the joining link opens.
Missing logistics	None. No form needed.
Next action and owner	Maya prepares to guide the agreed first session.

This completed record illustrates the end state. Your own record stays pending until you have actually verified the required items. Illustrative links and addresses on this page are not live coaching services.

05 · PUT IT TO WORK

Use the tools you already have

- 1. Make a clean master.** Open the editable DOCX in your existing document app. Save one untouched master, then make a copy for the client. Keep the coach-only readiness record private.
- 2. Finish the actual facts.** Fill every bracketed field, choose one email branch and delete unused questions. Check existing agreement and payment prerequisites. Do not send an incomplete draft.
- 3. Prepare the client copy.** Put only the preparation sheet in a separate document or attachment. Keep the intake separate and include it only if needed. Use client-specific access for private links.
- 4. Test before sending.** Send a test to yourself and preview it on a phone. Open each real link with client-level access, not just your owner account. Ask a test reader: "What happens next, when do we meet and how do you get help?"
- 5. Send and record.** Copy the chosen email into your normal email app and review the recipient and attachment. Send it yourself. Record the date and unresolved items. If a time is still being chosen, finish the joining details and preparation sheet after confirmation.

If something gets stuck

A link needs permission: correct access for that client, then retest.

A time zone is missing: confirm it before describing the session as booked.

A required agreement or payment item is open: keep readiness pending and follow your existing process.

The email feels busy: retain one main action; put reference details in the preparation sheet.

Optional ChatGPT bonus

Open Marketing_PMP_Welcome_Pack_ChatGPT_Prompt.txt and paste the prompt into a ChatGPT conversation you already use. Answer with general business facts and placeholders. The prompt drafts your pack, flags missing facts and keeps client copy separate from editor notes. Review every line; no paid-only feature is needed. You can complete the entire pack without AI.

Want the full onboarding journey connected

Marketing PMP can help connect intake, welcome messages, scheduling and internal handoffs around your actual process. This free pack is complete for its small job; a connected system is a separate service.

[Explore the Client Onboarding System](#) · [Contact Marketing PMP](#)