



CLIENT'S NAME

*Welcome Packet*

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Insertyourwebsitehere.com

WELCOME,

*Client's Name*

First thing is first.

Welcome them to your program/offer/etc and express your gratitude for being there with you.

Because YOU are grateful they took a leap and hired YOU to provide the solution for them.



I love to make this section a wee bit personal and tell them why I'm grateful to have THEM on this journey with me.

Along with what's possible for them and to remind them of the promise I hope to deliver with this offer.



# Mission

This is a good time to recap on your mission statement and why this... this offer... this service you provide is important to you as well as to your overall vision. It shows your client where you stand, what your vision is and allows them to be a part of the process.

L O  
G O

## WHAT YOU CAN

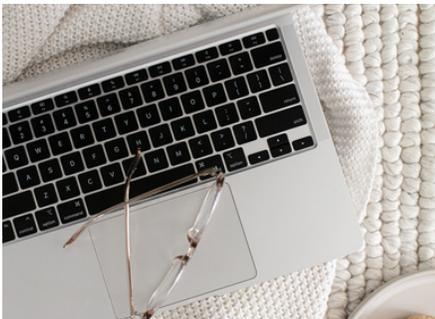
# Expect from Me

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### ✓ Core Value

Here you showcase what the client can expect from you along with your core values. Some folks get tripped up on "mission statement" and "core values".



### ✓ Core Value

As for core values, if my mission statement is the NORTH STAR then my core values are the tools in my toolkit to help me in that direction.



### ✓ IE. INTEGRITY

I will do my absolute best to hold my word and our time together. However, life can be a bit hectic. If the need arises, you will be notified when appointments or deadlines need to be adjusted. Open communication is a core value, so be open, honest and coachable to receive the maximum benefits.

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## PACKAGE SUMMARY

# Details & Deliverables

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This section is a bit of a recap of what they will receive within their investment as well as any deliverables and the time frame which they will be provided.

A lot of packages or services come with BONUSSES which everyone is always chomping at the bit to receive. This is a good time to jot down when those bonuses will be provided, so your client can mentally prepare to dive into them.



01

### Product Name or Bonus Here

This portion can contain the project's deliverables, in the form of bullet points or a short, descriptive paragraph. Add timeline, links or any additional helpful information.

02

### Product Name or Bonus Here

This portion can contain the project's deliverables, in the form of bullet points or a short, descriptive paragraph. Add timeline, links or any additional helpful information.

03

### Product Name or Bonus Here

This portion can contain the project's deliverables, in the form of bullet points or a short, descriptive paragraph. Add timeline, links or any additional helpful information.



## PROJECT

# Timeline

### WEEK 1

This may be \*optional\* for you pending your offer/service. For my Launch Strategy Package (LSP), I love to break down what we will be doing each and every week.

### WEEK 2

This provides the client with a visual tool, so they can see the progression of the work will be doing each week together.

### WEEK 3

Use this space to fill your client in with what you envision you both will be working on at this time.

### WEEK 4

Use this space to fill your client in with what you envision you both will be working on at this time.

### WEEK 5

Use this space to fill your client in with what you envision you both will be working on at this time.

## WHAT WE NEED FROM YOU

# Client Checklist

This is where you will share with them ANY work which needs to be performed before your first call/session together. What items they may need to purchase or have at the ready. If there's any links for them to click and sign up for, documents/pdfs for them to grab or anything else they may need to get started RIGHT!

### CHECKLIST

- Write what you would need here.



### INSERT A TASK OR QUESTION

Provide links or space for your client to provide feedback

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Provide links, documents or space for your client to provide feedback.

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## WHAT WE'LL USE

# Tools & Resources

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**01** Write the resource here.  
I absolutely LOVE sharing which tools and resources which will be used during our time together.

**03** Write the resource here.  
This is where I would showcase each resource and briefly provide a description of what it is for exactly.

**02** Write the resource here.  
With our LSP clients, I use several tools such as:  
Monday.com where I host their personalized business strategy, ZOOM to host our sessions, etc.

**04** Write the resource here.  
You can also add links for tutorials on how to use said resource, if needed.

# If You Need Me

### Contact Details

✉ hello@insertyouraddress.com

🌐 insertyourwebsitehere.com

### Office Hours

📅 M T Th F 10am - 4pm PST  
\*NOTE: Wednesdays OFF

### Response Time

🕒 Within 48 hrs except weekends

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## FREQUENTLY

# Asked Questions

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### Write one of the frequently asked questions here.

To save yourself loads of time answering similar questions, this space will help you get in front of the ball and tackle those questions BEFORE getting swamped answering them.

### Write one of the frequently asked questions here.

If you have a new offer/service, jot down questions you feel your client may have. One great exercise is to not just put yourself in their shoes but to consider what questions YOU have had before when signing up for a course, product, service.

### Write one of the frequently asked questions here.

Another good question to ask is in regards to a guarantee or money back option. Even if it was documented on a sales page, showcasing your guarantee whether you have one or not is always a good option. As it is another way to communicate this with your client.

### Write one of the frequently asked questions here.

I feel it is best to have at least 4 questions with answers provided and no more than six questions to reduce the feeling of overwhelm. However, you do you, boo! It's your business.

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# LET'S GET STARTED!

Delivering a WELCOME PACKET is a perfect tool to onboard clients! It provides them with a clear picture of what working with you + your team looks like, what they can expect, the resources which will be used in the process as well as what YOU expect from them!

I also love putting my calendly link attached to the button below so we can get started with our FIRST SESSION! However, if this doesn't apply to you, then... remove it!

[CLICK HERE TO SCHEDULE A CALL](#)

For me, this is the perfect spot to add my photo AND to provide a snippet of who I am as well as express gratitude once again for being part of their journey!

*Your Name*



hello@youraddresshere.com  
insertyourwebsitehere.com

