



The 7-Day Onboarding Jumpstart Plan

This 7-day plan is designed to help you create a strong first impression with new clients. Each step builds trust, shows progress, and sets the tone for a long-term relationship.

Day 1: Welcome Call

Hold a short call to thank your client and outline the next steps. Share a simple roadmap for the first 90 days.

Day 2: Personalised Welcome Email

Send a warm, branded email that recaps the call, includes contact information, and reassures them they're in good hands.

Day 3: Team Introduction

Introduce the client to the key people they'll work with. This can be a quick video or a short PDF with names and photos.

Day 4: Resource Pack

Provide useful resources such as FAQs, a short guide, or helpful tools to make them feel supported and confident.

Day 5: First Quick Win

Deliver a small but visible result (e.g. an initial review, quick audit, or first deliverable) to show momentum.

Day 6: Check-In Message

Send a short message or email to confirm everything is clear so far. Ask if they have any questions or concerns.

Day 7: Recap and Next Steps

Wrap up the first week with a summary of progress made and confirm what will happen in the next phase.

By following this 7-day plan, you'll turn new client excitement into long-term confidence. Consistency is key—repeat this process with every new client to make onboarding smooth and scalable.