✅ Tutorial: Build a Client Onboarding Workflow with Notion, Typeform, and Zapier

🎯 Goal

Create a seamless onboarding system where new clients submit info via a **Typeform**, Zapier automatically creates a **personalized onboarding dashboard in Notion**, and optionally sends an **internal or client-facing notification** (via email or Slack).

🧰 Tools You'll Need

- [Typeform](#) – for collecting client information

- [Notion](#) – to store dashboards or onboarding templates

- [Zapier](#) – for automation

- *(Optional: Slack or Gmail for notifications)*

📐 System Overview

1. Client fills a Typeform with project or onboarding details

2. Zapier is triggered and collects the form response

3. Zapier duplicates a Notion onboarding template and customizes it with the client's details

4. Notification is sent to the client or internal team

Step-by-Step Implementation

✅ Step 1: Create Your Onboarding Template in Notion

1. Open Notion and create a **Client Onboarding Template Page**

2. Include sections like:

    ○ Client Overview

    ○ Key Contacts

    ○ Project Timeline

    ○ Goals & Deliverables

    ○ Next Steps

3. Use **placeholders** like `{{Client Name}}`, `{{Start Date}}`, `{{Project Scope}}` to be filled dynamically by Zapier later

4. Save this template in a dedicated workspace or folder (e.g., `/Templates/Client Onboarding`)

✅ Step 2: Build the Typeform

1. Go to Typeform and create a new form titled "Client Onboarding Intake"

2. Include questions like:

   - What's your full name/company name?

   - What services are you onboarding for?

   - What is your preferred project start date?

   - Who is your main point of contact?

   - Any special requests or goals?

3. Make sure you **name your fields clearly** so you can identify them easily in Zapier

4. Publish the form and copy the link for future use

✅ Step 3: Connect Zapier to Typeform

1. Go to Zapier and click **Create a new Zap**

2. **Trigger: Typeform**

   - Event: *New Entry*

   - Choose your form

   - Test to ensure Zapier detects the form fields properly

✅ Step 4: Format the Typeform Response (Optional but Helpful)

1. Add a **Formatter step (Text → Replace or Extract)** if needed to clean up names, emails, or dates

2. Use this step to convert the start date into your desired format or to strip unwanted characters

---

✅ Step 5: Duplicate the Notion Template via Zapier

⚠️ Prerequisite: You must have **Notion API integration** enabled.

1. In Zapier, add **Action: Notion – Create Page**

   - Choose the **database or folder** where you want to store new client pages

   - Under "Parent Page", select the folder that contains your client dashboards

2. In the **"Content"** field:

   - Use **Rich Text** fields to dynamically populate the content

   - You can insert mapped values from Typeform like so:

     - Title: `{{Client Name}} – Onboarding`

Body:

```
Welcome {{Client Name}} 👋
✅ Start Date: {{Start Date}}
📝 Services: {{Selected Services}}
📍 Key Contact: {{Contact Person}}
🚀 Next Step: Kickoff call setup
```

3. You can also **embed checklists**, toggles, or project timelines using Notion blocks if needed

---

✅ Step 6: Send Notifications (Optional but Recommended)

Internal Team Slack Alert:

- Action: Slack → Send Channel Message

Message:

```
🆕 New client onboarded: {{Client Name}}
📅 Start Date: {{Start Date}}
💼 Services: {{Selected Services}}
🔗 Notion Dashboard: [Link to Notion page]
```

Client Welcome Email:

- Action: Gmail or Email by Zapier → Send Email

- Subject: Welcome to [Your Company], {{Client Name}}!

Body:

```
Hi {{Client Name}},
Welcome aboard! Your onboarding dashboard is ready: [Link].
We're excited to kick off your project!
```

✅ Optional Enhancements

- **Calendly Integration**: Add a follow-up step to schedule a kickoff call.

- **CRM Sync**: Automatically push new client data to HubSpot, Airtable, or your CRM.

- **Task Sync**: Trigger creation of tasks in Asana, ClickUp, or Trello from the onboarding form.

📊 Example Use Case

A digital agency uses this flow to onboard web design clients. After the form is submitted, each client receives a custom Notion space with project goals, shared files, timelines, and meeting links—while the internal team gets notified via Slack to prep kickoff materials.

✅ Final Output: What You Achieve

- A **personalized Notion dashboard** for every client

- A **fully automated intake-to-onboarding workflow**

- Real-time notifications to internal teams and clients

- No dev time, no code, just productivity