



# Mentoring Program

## Successful Business Building Steps

### Course 10 Module 4 Lesson 7

#### Creating Your First Webpage Your Onboarding Email Templates

In this lesson we'll give you sample email templates that you can use when you schedule a new client.

Notice that you will mostly be sending these onboarding (welcome) emails manually, one at a time because, as we mentioned in the steps for scheduling in Lessons 4 and 5, they will have various routes of getting to a session with you.

What you need to know for this lesson is that **you will need to create a document that has a list of several pre-written emails** that you will need to send the new client as they travel along the flow path of meeting you in session.

By pre-writing these and having them all in a single welcoming emails document, all you will have to do is copy and paste the text into an email – ideally from the email address that corresponds to your website!

Trust me, anything you do repeatedly in your business – like more than twice – keep a master template. It will save you hours of re-creating these wheels and cogs in your business.

There is a series of emails that you will send each new client (in the order shown below). This list shows when you send them and what each email needs to include.

1. **You receive their Client Intake Form:** This can be an email, but if you worked with Michael on setting up your website, he has connected a “thank you” webpage that is connected to Client Intake Form that will show up for the client as soon as they click the Submit button. (or in our case webpage) should be connected to the intake form. Whether you use an email or a webpage for this, it should tell them thank you for submitting your intake form, and then **you need to decide** today which of the two options below you will offer them.



# Mentoring Program

## Successful Business Building Steps

- A. **Thank you for submitting your Client Intake Form.** Please submit payment for your (name of the initial session). **After I've received your payment, I will call you to schedule your session.** (This option will require that you provide them with the payment link or link to your Session Payment page that we created in Lesson 6.)
- B. **Thank you for your intake form,** I will review it and contact you within 24 hours to help you schedule your (name of initial session).

**The first thing you need to decide** is which path you want your new prospective client to follow? Option A or Option B above.

As for the other emails, the assignment at the end of this lesson will be to create a master emails document that you can quickly "cut and paste" into an email message that you will send to each prospect/client at the appropriate time. (A good idea after creating these emails is to save them as "Drafts" in your email program so that you can copy and paste them into new emails without leaving your email program.)

As an overview, here are the **other times you will need to send an email and what you'll want to put in it.**

2. **They schedule a session with you:** They need a thank you for scheduling your (name of) session with me. This email should have a reminder of the date and time of the session AND a link to submit Pay Pal Payment.
3. After you **receive their session payment:** You want to send them a Thank you for your payment! Please, be sure to let them know that the payment went through ASAP. This email will be gracious and thanking them and it will include a reminder of the session date and time and this is the first time the client should actually receive your Office Address or your private ZOOM or Phone Number that they will use for their actual session.

NOTE: PayPal will email you when someone makes a payment. If you worked with Michael to build your website, a payment "thank you" page has already been created and will be linked to your payment links and buttons once those are created. **You will still need to send an email with the session date, time, office address, phone and/or Zoom information.)**

4. **24 Hours prior to the session:** This email is a quick reminder of the date and time of the session, the ZOOM or phone number and in this email be sure to remind them of your no-show policy so that there's no hard feelings if they miss the session and you keep the funds.



# Mentoring Program

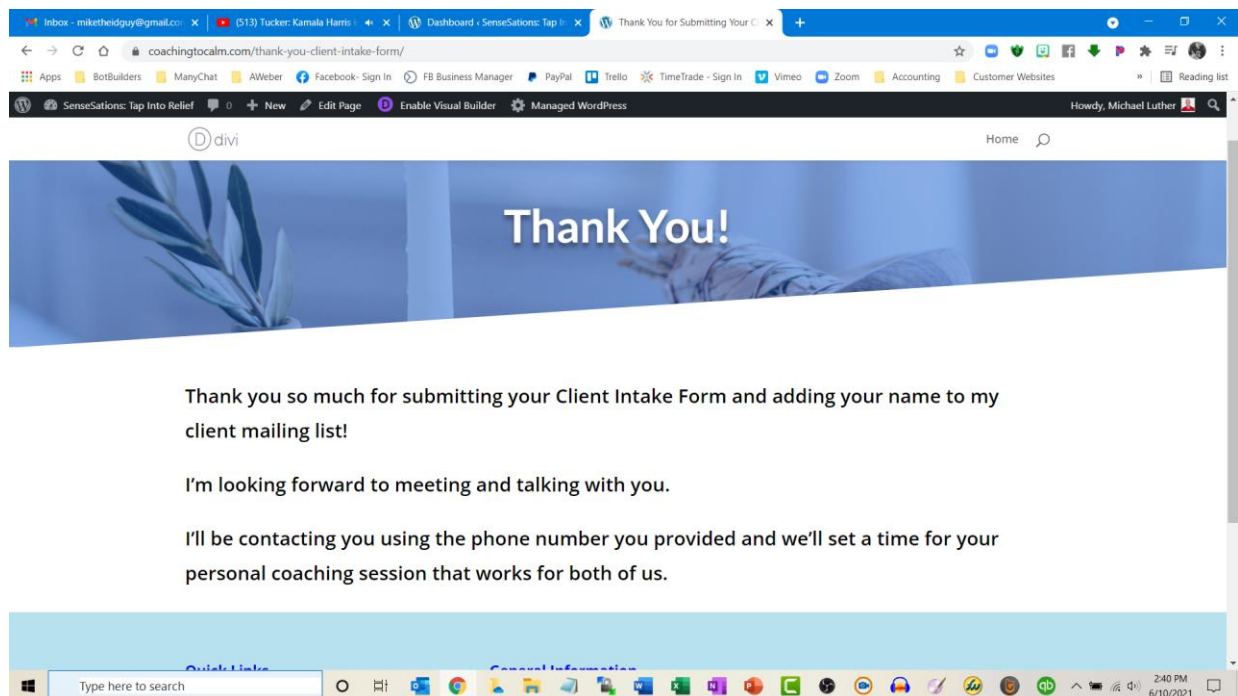
## Successful Business Building Steps

5. **After their first session, links to pay for more sessions:** This email will, of course, **celebrate the work you have done**, **mention some of the highlights of the session** and may include a **reminder of looking forward to** helping you with... Ideally, you've already scheduled their next session(s) while you were on the phone/Zoom with them, so this email needs to have **a list of those dates and times** as a reminder and then, of course, **a link to your PayPal payment**.
6. Rinse and repeat... Thank You for Your Payment Email #2 (above) and emails 3-4, etc.

**Our templates you can use as models for creating your form emails are shown below. Feel free to copy these and replace your information where necessary.**

### 1. Thank you for submitting your Client Intake Form:

NOTE: If you have hired Michael to assist you with the initial set up of your website, this page will be done for you. **That page reads:**





# Mentoring Program

## Successful Business Building Steps

### **AWEBER AUTO RESPONDER EMAIL FOR MAILING LIST SIGNUP**

(If you worked with Michael, this has already been setup in your AWeber program. It is an email that will automatically go out to anyone who fills out your Client Intake Form and mailing list signup form if you create one.)

**TITLE: Thank you for signing up!** ❤️ 😊

#### **BODY TEXT:**

Hello {!firstname\_fix}!

Thank you so much for signing up for my mailing list!

I'll be using the email address you provided to stay in touch with tapping tips, insights and other cool stuff.

To make sure you receive my emails, please take a minute to add aweber.com and my email address to your safe senders list.

Talk to you soon!

With love,  
Larissa

### **2. Thank you for scheduling your (name of) Session**

This is an email that you'll want to **save as a draft in your email program** (i.e., Outlook, Yahoo, Hotmail, Gmail, etc.) so that you can copy and paste the text into a new email and edit for your new client. You will obviously need to change the Title and location to reflect the name/type of session.



# Mentoring Program

## Successful Business Building Steps

**TITLE: Thank you for scheduling your Personal Coaching Session**

**BODY TEXT:**

Hello, (First Name)!

It was great talking with you. Based on our phone conversation, I've scheduled your Personal Coaching Session Zoom appointment for the time and date shown below.

**Tuesday, June 15, 2021**

**11:00 AM EDT**

**Duration: 60 Minutes**

Here's the Zoom call information (please connect using the link and password below at your scheduled appointment time):

Connect to Zoom: **[Enter Your Zoom Link Here](#)**

Password: **[Enter Your Zoom Meeting Password Here](#)**

**(Note: If you haven't used Zoom before, you'll want to click on the link above and let Zoom download their app to your computer or mobile device so that there isn't any delay in connecting at your appointment time.)**

You can pay for your Personal Coaching Session using the *PayPal* link below. Please submit your payment prior to 12:00 PM EDT on the Sunday prior to your appointment.

**[Enter Your PayPal Payment Link Here](#)**

**CANCELLATION POLICY:** You agree to provide at least 24 hours advance notice if you need to cancel or reschedule your personal coaching session. If you do not provide the 24 hours advance notice, you understand and agree that you will be charged in full for that personal coaching session.

If you have any other questions, just let me know. Thanks!

Best regards,  
Your First Name

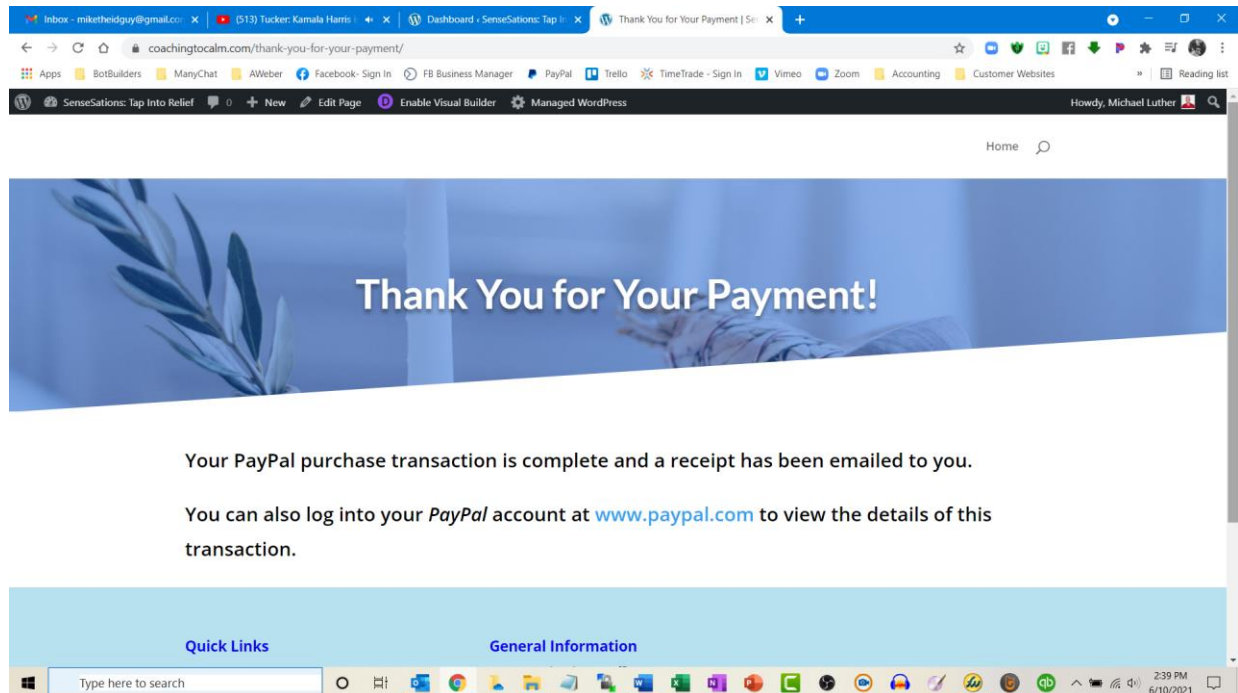


# Mentoring Program

## Successful Business Building Steps

### 3. Thank you for your payment!

NOTE: If you have hired Michael to assist you with the initial set up of your website, this page will be done for you. **That page reads:**



### 4. Session Reminder

This is another email that you'll want to **save as a draft in your email program** (i.e., Outlook, Yahoo, Hotmail, Gmail, etc.) so that you can copy and paste the text into a new email and edit for your new client. And, again, you will need to change the Title and location to reflect the name/type of session. We've included the payment link just in case your client hasn't paid for their session yet.



# Mentoring Program

## Successful Business Building Steps

**TITLE: Friendly reminder about your upcoming Personal Coaching Session**

**BODY TEXT:**

Hello, (First Name)!

This is just a friendly reminder that you have a Personal Coaching Session scheduled with me at the date and time shown below.

**Tuesday, June 15, 2021**

**11:00 AM EDT**

**Duration: 60 Minutes**

Here's the Zoom call information again for your convenience (please connect using the link and password below at your scheduled appointment time):

Connect to Zoom: **Enter Your Zoom Link Here**

Password: **Enter Your Zoom Meeting Password Here**

**(USE THE PAYMENT SECTION BELOW IF THE CLIENT HASN'T PAID)**

Please pay for your Personal Coaching Session using the *PayPal* link below:

**Enter your PayPal payment link here**

**CANCELLATION POLICY:** You agree to provide at least 24 hours advance notice if you need to cancel or reschedule your personal coaching session. If you do not provide the 24 hours advance notice, you understand and agree that you will be charged in full for that personal coaching session.

If you have any other questions, just let me know. Thanks!

Best regards,  
Your First Name



# Mentoring Program

## Successful Business Building Steps

### 5. After-Session Celebration, confirming dates of next sessions and link to *PayPal*.

This is also an email that you'll want to **save as a draft in your email program** (i.e., Outlook, Yahoo, Hotmail, Gmail, etc.) so that you can copy and paste the text into a new email and edit for your new client. And, again, you will need to change the Title and location to reflect the name/type of session.

**TITLE: Friendly reminder about your upcoming Personal Coaching Session**

**BODY TEXT:**

Hello, (First Name)!

It was wonderful working with you today!

I feel like we accomplished so much and I look forward to helping you with... in our next personal coaching session together.

I've included the date(s) and time(s) of your scheduled sessions below for your convenience.

**Tuesday, June 15, 2021**  
**11:00 AM EDT**  
**Duration: 60 Minutes**

Here's the Zoom call information again for your convenience (please connect using the link and password below at your scheduled appointment time):

Connect to Zoom: **Enter Your Zoom Link Here**

Password: **Enter Your Zoom Meeting Password Here**

You can pay for your Personal Coaching Session(s) using the *PayPal* link below:

**Enter your PayPal payment link here**

**CANCELLATION POLICY:** You agree to provide at least 24 hours advance notice if you need to cancel or reschedule your personal coaching session. If you do not provide the 24 hours advance notice, you understand and agree that you will be charged in full for that personal coaching session.

If you have any other questions, just let me know. Thanks!

Best regards,  
Your First Name

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## **Successful Business Building Steps**

**Your Assignment:**

**Create your Emails document!**