

Client onboarding that runs itself

For solo operators running the whole business.

Who this is for

Solo operators and one-person businesses who wear every hat â sales, delivery, admin, and support â and need leverage without hiring a department.

Every new client asks the same questions you already answered last month.

Suggested stack

Intake form + Notion client page + email sequence. Primary tools: Notion, Fillout, Zapier.

Do this

1. Build an intake form: goals, access list, brand assets, deadlines.
2. On submit: clone a client Notion template and fill fields.
3. Auto-send welcome email with portal link and first milestone.
4. Internal checklist: access granted, invoice sent, kickoff booked.

Operator tip

If onboarding needs you for every click, it is not a system yet.

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