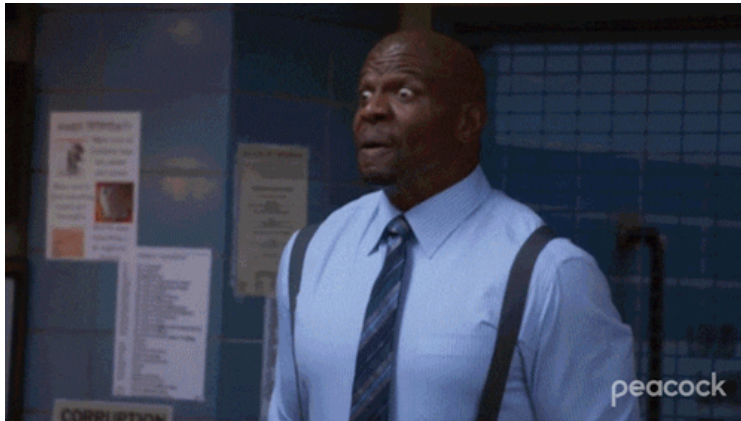


New Client Onboarding Emails

[WELCOME EMAIL]

Hi [name],

First, we just have to say: CONGRATS on beginning your digital marketing journey! Everyone on the [redacted] team is chomping at the bit to get started on taking your business to new heights. We know you are!



But first, we need to sort out the official stuff. Attached to this email you'll find **important documents** and information on how to schedule your **kickoff meeting**.

Your Important Documents

1. Finalized copy of your proposal
2. Onboarding Document

The finalized copy of your proposal is for your records. The onboarding document includes our contact information along with other important info our clients need to know—where to find reports, how to send us information, common marketing terms, etc.

Your Next Steps

Ready to schedule your kickoff meeting?



Below is a link to a calendar with available dates and times. Choose the one that works best for you!

Click here: [\[REDACTED\]](#)

Want to include team members in the meeting? After the meeting is scheduled, you can add any of your team members to the calendar invite.

And don't worry—we'll send you a reminder email about the meeting at least a day or two in advance.

We're looking forward to seeing you at your kickoff meeting! Please reach out if you have any questions between now and then.

Bye for now,

[\[REDACTED\]](#)

Kick-off Meeting Reminder - How to Prepare

[Kick-off Meeting Reminder/Preparation Email]

Hi [name],

We are gearing up for your kickoff meeting on [DATE] at [TIME]. Your dedicated marketing team is looking forward to meeting you—we hope you're as excited as we are!

In the meantime, there are **a few quick homework assignments** we need you to complete. They'll help you get ready to rock it at the meeting!



1. Take a First Look at Your Marketing Team

Here is a video you can watch to learn more about your new marketing team!

[Embed Video HERE]

2. Get to Know Your Google Drive

Here is a link to your Google Drive folder. We'll use this folder to house all of the content we create for you. It's also where you can upload logos, photos and other important information that will be helpful for our team to access.

Never used Google Drive before? No problem! [Here is a helpful link that shows you how to upload documents.](#)

3. Upload Any Branding Documents

Now that you are an expert in uploading, you'll need to **upload a few things prior to our kickoff meeting.**



Here is what we will need ahead of time:

- Your logo
- Any branding guidelines
- Anything else you think would be helpful for us to have ahead of time

Remember, uploading any important information ahead of time will make your kickoff meeting more efficient and productive!

4. Connect or Upload Your Social Media Credentials

Make sure to have your **credentials for your social platforms** ready, and anything else we may need access to.

Some clients like to use our [Client Connect Portal](#) to allow us to access their social media accounts. Others just add their credentials into their Google Drive folder and let us do the rest!

Whatever you're most comfortable with!

Let me know if you have any questions. Otherwise, we'll see you tomorrow!



We're Excited to Work With You email which will include any homework items (1 day after kick-off)

Subject Line: Post-Meeting To Do's 📝

Hi [name],

Thanks for a great kick-off meeting! We really enjoyed getting to know you and your business. If your head is still spinning from all of the information we discussed yesterday, rest assured, it gets easier from here!



Once we get in the groove, you'll find that you'll be spending very little time on your marketing. You'll have much more time to work on the parts of your job/business that you enjoy!

We need just a few more things to get the ball rolling:

[List of homework items]

But wait, there's more!

Before you go, we wanted to let you know that we at [REDACTED] LOVE to celebrate! Whether it's a big company win, a new dog, or your birthday, we take a lot of joy in acknowledging our clients' milestones.

To help us celebrate you, please click this link [\[insert link to LP with form\]](#) and share your birthday (don't worry, we won't ask the year) and business anniversary with us.

Cheers!

[REDACTED] Team

Content Strategy Meeting Reminder Email

Subject Line: Reminder - Content Strategy Meeting Tomorrow!

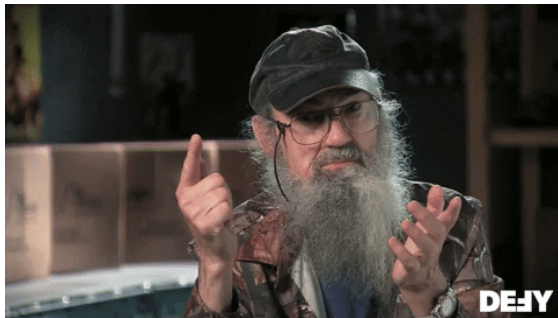
Hi [\[name\]](#),

Excited for our **Content Strategy Meeting** tomorrow? It should be a fun, fast-paced info-session. Here are a couple of the key points we're going to cover:

- The [redacted] Way: Our content production process
- [redacted]'s content "recipe for success"
- How to get the best ROI with your content

Intrigued? We sure hope so!

A key to creating high quality content for you is having handy-dandy resources available at our fingertips. Please click here [\[insert link to doc\]](#) to review our content checklist and make sure you've uploaded all the necessary documents.



Bonus Points: Before the meeting, jot down a few organizations you follow or are members of and any online or print publications you read. This will help us brainstorm more content that is relevant to your industry and affiliations!

See you tomorrow (on Zoom)!

[redacted] Team

[redacted] **Process Email**

Hi [\[name\]](#),

Thank you for a great meeting yesterday! Our lil' marketing elves (AKA Marketing Coordinators & Writers) are now feverishly working on creating your first month of content.

While they're doing so, we wanted to take a moment to review a couple of key items:

1. Our Process

At this point, we've given you a lot of information. To reiterate, we want to review our content creation process with you.

[Insert Process Graphic]

2. Approving Content

When we send content to be reviewed, please aim to respond with your approval or any changes **within 5 business days**. Remember, your role in **approving your content in a timely manner** is the key to keeping your marketing consistent. (It will also ensure you're getting the best ROI possible!)

We know you're UBER busy, so our goal is to make the content approval process as easy as possible for you! Here are some helpful resources:

- Watch this video to learn **how to review your content**. [\[insert link\]](#)
- Click here [\[insert link\]](#) to learn **how to make comments/suggestions** in your Google Docs.

Questions?

If at any point in the process you need further clarification, don't hesitate to reach out to your marketing coordinator! They'll make sure the content creation process is as seamless as possible for you.

Keep a lookout for your content coming soon!



██████████ Team

Show Me the Money email (includes a reminder about our CSM - 1 day prior to mtg)

Hi [\[name\]](#),

Can you believe we've been working together for a month already? Boy, oh boy, time sure flies when you're having fun!

This is a friendly reminder that we have our Client Success Meeting tomorrow.

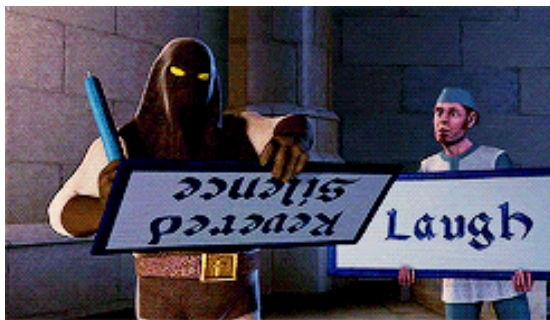
In the CSM meeting, we will:

- Recap the past month's accomplishments
- Review reports and results with you
- Answer any questions you may have

On average, our clients typically see **the most results/wins between 3-6 months**. However, it's important that you see **the foundation we've been laying for all your future successes**.

(And, as we said before, we like to party...ahem, I mean *celebrate* ALL wins!

With that, we want to wish you a happy 1 Month Anniversary! (Aw, cute!)



We're looking forward to meeting with you tomorrow!

Your [redacted] Team