

Tutorial 59 Worksheet

My AI Client Onboarding Builder

Step 1: Define Your Core Service & Offer

- * What specific service or digital product package are you offering?
 - * My Core Offer:
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Step 2: Define Your Boundaries & Working Hours

- * What days and hours do you want to handle client emails and calls?
 - * My Client Hours:
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Step 3: Test Your Welcome Email Prompt

- ***Fill in the blanks and submit this prompt to your AI agent:***

"Act as my Client Operations Agent. Draft a 3-paragraph welcome email for a new client purchasing my [Insert Offer]. Include my office hours ([Insert Hours]), state that our first step is completing a 3-question intake form, and thank them warmly."

Step 4: Choose Your Simple Invoicing Tool

- **Which low-overhead platform will you use to issue invoices or accept payments?**
 - * ☐ Stripe / PayPal direct payment links
 - * ☐ Wave / QuickBooks simple PDF invoices
 - * ☐ Simple bank transfer / digital cash app