

Client Welcome Email Template

A polished post-signing email you can customize for any new client.

SUBJECT LINE OPTIONS

- Welcome aboard, [Client Name] - next steps
- We're officially getting started
- Welcome to [Your Business / Service Name]

EMAIL TEMPLATE

Hi [Client First Name],

Thank you for choosing to work with me. I'm excited to get started and support you with [brief service / project outcome].

To make onboarding smooth, here are the next steps:

1. Complete the intake questionnaire: [link]
2. Share the required account access using the secure method listed here: [link / instructions]
3. Review our kickoff call details: [date, time, timezone, meeting link]
4. Add any existing files, brand assets, references, or documentation here: [folder link]

Before our kickoff call, I'll review everything you submit so we can use our meeting to confirm priorities, workflow, responsibilities, and timelines.

If anything is unclear, reply to this email and I'll help you through it.

Looking forward to working together,

[Your Name]

[Role / Service]

[Email] | [Website / Portfolio]

CUSTOMIZATION CHECKLIST

- ☐ Confirm client name and company
- ☐ State the service or outcome clearly
- ☐ Insert intake form link
- ☐ Insert secure access instructions
- ☐ Insert kickoff details
- ☐ Insert shared folder link
- ☐ Set expectations for the next step