
















Welcome Package Checklist



Essentials for your Welcome Package:

-  A signed contract using a program like HelloSign
-  A welcome note from you
-  Where to from here
-  A link to book the next session
-  Your business hours
-  Your refund policy
-  Your privacy and confidentiality policy
-  Your cancellations policy and process
-  The scope of work you have both agreed and the timeline
-  How you plan to communicate (ie email, slack, other program) & how often

Additional Information your could include:

-  A link to a questionnaire to help you kick off your first session
-  Any relevant resources or tools
-  A snail mail thankyou card and/or gift ie flowers, a notebook, a meditation
-  Access to a shared workbook (i.e. in Asana or Evernote)
-  Homework to get them started while they have momentum!

Now it's time to start drafting your Welcome Package. Let me know how you go!