

# Online Tools for Client Onboarding



1. Hellosign
  - for digital contracts - no more print, sign, fax, scan!
2. Acuity/ Calendly
  - online scheduling program
3. Online Calendar
  - Google calendar or iCal to sync with your online scheduler
4. CRM (Customer Relationship Manager)
  - contains all of the relevant information about the client
  - eg. Insightly, Asana, Dubsabo, Zoho, Capsule, Streak
5. Communication
  - to communicate with your client
  - eg. Slack
6. Typeform
  - set up a questionnaire to get to know more about your clients
7. Evernote
  - to file and share client communications, resources, templates, notes
8. Online Video Calls
  - for online meetings
  - eg. Zoom, Skype
9. Payment Gateway
  - to receive money eg. Paypal/ Stripe
10. Integrations
  - automations that trigger actions and allow these programs to talk to one another eg. Zapier.com