Client *Intake* Tasks

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Client

....

Task	Date Completed
☐ Add to client mailing list	....
☐ If no autoresponders/automation, send:	....
○ Copy of contract	
○ Client info form(s)	
○ List of resources/tools	
☐ Send Contract(s)	....
☐ Add folder in Dropbox or Google Drive (Clients › [client name])	....
☐ If no CRM, create Notes document	....
☐ Add folder in email client (Clients › [client name])	....
☐ Add client to CRM (if not automated with email manager)	....
☐ Add client to invoicing service	....
☐ Add client to phone & email address books	....
☐ Schedule client calls or send client a link to scheduler	....
☐ File copy of contract(s)	....