

Four lines into Claude. *The whole welcome pack back.*

One Claude Project that writes the welcome email, the kickoff agenda, the first week checklist, and the folder list every time a client says yes. Two parts: the instructions, where you write your method down once, and the files, where Claude learns how you actually sound.

Set it up once

1 The instructions: write your method once

Projects → New Project → name it Client Onboarding → Create Project. Under Instructions, click the plus button, choose Set project instructions, paste this, then Save instructions.

PROJECT INSTRUCTIONS

You run my new client onboarding.

Every time I give you a new client in a few lines (their name and business, what they bought, the price and terms, the start date and the kickoff time), reply with the complete welcome pack in one message, in this order:

1. The welcome email. Write it in the voice of the sample welcome email in this project. Confirm what they bought, the price and the terms, and the start date. Keep it short and warm.
2. The kickoff agenda. Five items, thirty minutes total, with a time on each. Follow the shape of the sample agenda in this project.
3. The first week checklist, split into two lists: my tasks and the client's tasks.
4. The folder list I will set up for this client, with their name already filled into the folder names.

Use the details I gave you everywhere they belong. If something is missing, make a sensible assumption and flag it in one line at the end instead of asking me a question first.

The move: name the four things you want back, every time. That list is what makes the output identical for client number one and client number forty.

2 The files: teach it how you sound

Under Context, click the plus button, choose Upload from device, and add exactly two files: a welcome email you really sent and liked, and a kickoff agenda that worked.

Strip the client details out first. The sample teaches Claude your voice and structure, not one client's private information. Two good samples beat thirty.

3 Run it on a real client

Open a new chat inside the Project. Your whole message is four lines.

PASTE INTO THE PROJECT CHAT

New client: Priya, solo brand photography studio. Sold: a two week automation setup. Price: 2,000 dollars, half upfront. Start date: Monday the 14th, kickoff call Tuesday at 10.

What comes back, in one reply: *the welcome email in your voice with the start date correct, the agenda with five items across thirty minutes, the checklist split into your tasks and theirs, and the folder list with the client's name filled in.*

4 Turn the agenda into something they can click

Most kickoff documents are a wall of text and nobody reads them. Ask for an Artifact instead.

PASTE INTO CLAUDE

Turn the kickoff agenda into a clean, one-page interactive I can share with the client: title, date, the five agenda items, and the two things they need to bring. Make it an artifact.

Then: *download it as HTML, or publish it for a link that goes straight into the welcome email. It is the first thing the client sees from you after the yes.*

The setup checklist

Tick these off

- Create the Project and name it Client Onboarding.
- Paste the instructions and save them.
- Upload one real welcome email, details stripped out.
- Upload one kickoff agenda that worked.
- Paste your next client in four lines.
- Fix one thing in plain language, then put the fix in the instructions so it sticks.
- Ask for the kickoff agenda as an Artifact and publish the link.
- Use it on the next client who says yes, instead of a blank document.

Onboarding handled. What should you automate next?

The free AI Audit looks at how your business runs and tells you where to start. Two minutes, no call, no pitch.

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