FE2 ESSENTIALS

# Our onboarding standard

FE2

fe2.biz/essentials/#onboarding-standard

One page that says exactly what every new customer gets, when, and from whom. Cross out and rewrite the suggestions to suit you. Keep a printed copy at the front desk.

Business: Owner: Last updated:

| When | What happens (suggestions in grey: rewrite to suit you) | How | Who | Done-check |
|---|---|---|---|---|
| **Day 0 (joins)** | Welcome email sent within an hour, with one next step. Getting started checklist handed over. | | | ☐ |
| **First visit or first session** | 10-minute welcome chat (see call scripts). Show 2 or 3 things to start with. Note the minimum term end date. | | | ☐ |
| **Day 3** | Nudge anyone who hasn't started. | | | ☐ |
| **Day 7** | Check they reached the first result. Follow up anyone who hasn't. | | | ☐ |
| **Day 14** | Check-in email: how are your first two weeks going? | | | ☐ |
| **Day 30** | Check-in with one question: how is it going, and what would make it better? | | | ☐ |
| **Monthly** | 20-minute review with the owner: who got the full checklist, what customers said, what to change. | | | ☐ |
| | | | | ☐ |

### Our first result

_____

### Find the real number

List customers who joined in the last 6 months, who welcomed them, and whether they still pay. If one person's customers stay more often, copy what they do.