

Zero Touch Onboarding

Business Automation

A structured onboarding system that takes a signed client from payment to active engagement in under 24 hours. Automated workspace creation, kickoff communication, and tier-specific input collection with zero dropped handoffs.



<1h

AUTOMATED SETUP

<24h

KICKOFF EMAIL

<10min

OF YOUR TIME

TIMELINE	KEY RESULT	TECH STACK
<p>Methodology designed across 5 engagement tiers, proven with 2 client projects</p>	<p>Every new client gets a fully provisioned workspace, kickoff email, and clear next steps within 24 hours of payment without manual orchestration</p>	<p>Python FastAPI</p> <p>Google Workspace API (Drive, Calendar, Gmail, Chat)</p> <p>PostgreSQL</p>

The Problem

The gap between payment and first milestone is where buyer's remorse lives. A client just committed money. The worst thing that happens next is silence. Without a system, the consultant scrambles to set up folders, draft emails, and remember what was agreed while the client wonders if they made a mistake.

- ! Client pays and hears nothing for days while the consultant manually sets up infrastructure
- ! No standardized workspace structure. Every engagement starts from scratch
- ! Kickoff communication varies wildly in quality and completeness depending on how busy the consultant is
- ! Input collection depends on memory. Critical assets arrive late or not at all, pushing timelines

The Approach

Built around one principle: the client just committed money. Within 24 hours, they should have a kickoff email, a shared workspace, and clarity on what happens first. Onboarding is not folder creation. It is transforming a prospect into a working client.

✓ Payment triggers automated infrastructure: Drive workspace, Calendar blocks, and Chat notification, all within an hour of Stripe confirming

✓ Tier-specific templates scale from a simple 3-day Reality Check to an 8-week Launch engagement without manual reconfiguration

✓ Kickoff email is generated from templates but always reviewed before sending. Automation handles assembly, humans handle tone

✓ Input collection has built-in escalation: gentle reminder at deadline, pause at +3 days, close at +30 days

INTENTIONALLY LEFT OUT

No client-facing portal yet. Communication runs through Google Chat (1:1 spaces) and email. A portal adds value at scale but adds complexity at this volume. Google Workspace handles everything at zero additional cost.

The Solution

A complete onboarding flow triggered by payment confirmation. Every step hands off to the next automatically. The consultant reviews and sends the kickoff email. Everything else is handled.

- ✓ Payment confirmation triggers workspace creation: Google Drive folder with tier-specific structure, shared with the client
- ✓ Kickoff document generated from template, populated with client name, dates, milestones, and deliverables
- ✓ Calendar events created for all milestones with buffer time between them
- ✓ Kickoff email drafted with workspace link, timeline, what the client needs to provide, and communication expectations
- ✓ Google Chat notification to #engagements with payment amount, tier, and onboarding status
- ✓ Input collection checklist with tier-specific requirements and escalation cadence if assets are late

Technical Highlights

Google Workspace APIs handle folder creation, document templating, calendar events, and email, all included in Business Standard at zero incremental cost

Tier configuration drives everything: one onboarding function, five different experiences based on engagement complexity

The pause mechanism protects margins: if a client takes 3 weeks to send brand assets, the delivery timeline shifts by 3 weeks, not the consultant working overtime to catch up

The Results

The methodology replaces ad-hoc onboarding with a repeatable system that scales across engagement tiers without additional manual work per client.

<1h

AUTOMATED SETUP TIME

<24h

KICKOFF EMAIL DELIVERY

<10min

OF YOUR TIME

Lessons & Takeaways

Automate assembly, not judgment

The system creates folders, populates templates, and blocks calendar time. But the kickoff email, the first thing a paying client reads, always gets a human review. The 30 seconds spent reviewing is worth more than the hours of manual setup it replaces.

Tier-specific templates prevent over-communication

A Reality Check client needs a session date and prep instructions. A Launch client needs an 8-week schedule, credential checklists, and handoff plans. One-size-fits-all kickoff emails either overwhelm small engagements or under-prepare large ones.

The pause mechanism is a feature, not a bug

When a client delays sending required inputs, the engagement pauses and the timeline shifts. This protects the consultant from scope creep by delay and sets clear expectations from day one.

Have a Similar Challenge?

Let's talk about how I can help solve it.

[Start a Conversation](#)