

AI POWERED CEO WORKSHOP

The Client *Welcome Kit*

Ready-made welcome packets, questionnaires, and simple agreements for your new clients. Give a five-star first impression from day one.

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AI Powered CEO · The Gen X Sister Who Figured It Out

FREE FOR PAID MEMBERS

First impressions, sorted.

How you welcome a new client sets the tone for everything. This kit gives you the templates to make every client feel cared for and confident, right from day one.

Copy each one, swap in your details, and reuse it for every client. No more starting from scratch.

How to use this kit

1. Pick the template you need for where you are with a client.
2. Copy it and replace anything in [brackets] with your details.
3. Save your filled-in versions as your reusable client system.
4. Send the right one at the right moment, every time.
5. Want it more "you"? Paste it into Claude and say "make this sound like me."

Welcome Packet

Get Started

The Agreement

During the Work

Wrap Up

Please note: The agreement templates are a starting point, not legal advice. Have a professional review them before using them with clients in your area.

The Welcome Packet

1 Welcome letter

WELCOME

The first thing a new client receives.

Hi [Client Name],

Welcome, and thank you for trusting me with [project / service]. I'm so glad we're working together.

Here's what happens next: [first step]. I'll be with you every step of the way.

If anything ever feels unclear, just ask. I'm here.

Warmly,
Celeste

2 What to expect

WELCOME

Set the journey out clearly.

Here's the journey we'll take together:

1. [Step one, and what happens]
2. [Step two, and what happens]
3. [Step three, and what happens]

Timeline: [rough dates or duration].

You'll hear from me at each stage, so you always know where we are.

3 How we work together

WELCOME

Set friendly expectations early.

A few simple things so we're on the same page:

How we'll talk: [email / voice notes / calls].

My hours: [days and times].

Response time: I reply within [timeframe].

What I'll need from you: [files, feedback, access].

Easy and clear, so we can focus on the good stuff.

Getting Started

4 Onboarding questionnaire

INTAKE

Get everything you need to begin.

A few questions so I can do my best work for you:

1. What's the main result you want from this?
2. What does success look like for you?
3. Who is your audience or ideal customer?
4. What have you tried before?
5. Anything I should know or avoid?
6. Your deadline or any key dates?

5 Brand & details checklist

INTAKE

Gather their brand basics in one go.

Please send over:

- Logo and brand colours
- Fonts you use
- Links to your website and socials
- A few examples you love (and why)
- Your tone: how you want to sound
- Anything else that's "so you"

6 Access & logins request

INTAKE

Ask for what you need, securely.

To get started, I'll need access to [tools / accounts].

Please share these safely using [your preferred secure method]. Never send passwords in a plain message.

If you're not sure how, tell me and I'll walk you through it.

The Simple Agreement

7 Service agreement

AGREEMENT

A plain-English starting point. Have it reviewed first.

This agreement is between [Your Name] and [Client Name].

The work: [describe what you'll deliver].

Timeline: [start and end, or duration].

Investment: [total price].

This covers: [what's included].

This does not cover: [what's out of scope].

Both parties agree to communicate openly and kindly throughout.

8 Payment terms

AGREEMENT

Make money simple and clear.

Payment:

- Total: [amount]
- Schedule: [deposit / instalments / on completion]
- How to pay: [method]
- Due dates: [dates]

A [deposit %] deposit secures your spot and start date. Work begins once it's received.

9 Scope & revisions

AGREEMENT

Prevent scope creep, kindly.

Included: [number] rounds of revisions per [deliverable].

Extra revisions or new requests beyond what we agreed are billed at [rate], so we keep things fair for both of us.

I'll always flag it before any extra cost, never a surprise.

During the Work

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Kickoff message

IN PROGRESS

The "we're off" moment.

We're officially underway, [Client Name].

Here's what I'm working on first: [task]. You'll have [deliverable] by [date].

Sit back. You're in good hands.

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Progress update

IN PROGRESS

Reusable update that builds confidence.

Quick update on [project]:

Done this week: [what you finished].

Next up: [what's coming].

Anything I need from you: [requests, or "nothing for now"].

All on track. More soon.

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Feedback request

IN PROGRESS

Make giving feedback easy.

Here's [deliverable] for your review.

To make feedback easy, tell me:

1. What you love
2. Anything you'd change
3. Anything missing

Please send it all in one go by [date], so I can action it in one pass.

Wrapping Up

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Handover note

WRAP UP

End the work feeling complete.

That's a wrap, [Client Name]. What a journey.

Here's everything you need: [files / links / logins].

A quick how-to: [any instructions].

It's been a joy. I'm proud of what we built.

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Testimonial request

WRAP UP

Ask while the love is fresh.

One small favour, [Client Name].

Would you share a sentence or two about your experience? It helps other women find me. These quick questions make it easy:

1. What was it like before we worked together?
2. What's different now?
3. Who would you recommend this to?

Thank you, truly.

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Stay-in-touch invite

WRAP UP

Keep the door open for more.

I'd love to keep supporting you, [Client Name].

If you ever want to [next offer / ongoing support], I'm just a message away. And if you think of someone who'd love this, send them my way.

Cheering you on, always.

Celeste

Every client feels the difference.

A warm, organised welcome is what turns a one-time client into a raving fan. Now you have it, ready to go, every single time.

Save your filled-in versions. This becomes your signature client experience.

Go make someone feel five-star.

Celeste

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