



Client Welcome Templates

Gracious, ready-to-use messages for serving a new client well. Copy them, replace the **[brackets]** with real details, and let them sound like *you* — warm, clear and professional.

TEMPLATE 1 · FIRST MESSAGE / APPLICATION

Introducing yourself

Hi **[Client name]**,

I came across your post for a **[role]** and I'd love to help. I support **[type of business/ministry]** with **[2–3 services]**, so you can focus on **[what matters most to them]**.

A little about me: **[one warm, honest sentence about your strengths]**. I'm reliable, detail-oriented, and quick to learn new tools.

Would you be open to a short call this week? I've attached my resume and a couple of samples.

Warmly,
[Your name]

Keep it short, personal, and about them. Mention something specific from their post.

TEMPLATE 2 · WELCOME & THANK-YOU

After they hire you

Hi **[Client name]**,

Thank you so much for trusting me with this — I'm genuinely glad to be on your team. To start us off well, I'll send a few quick questions so I can support you exactly the way you need.

My usual hours are **[your hours/timezone]**, and the best way to reach me is **[email/Slack]**. You can expect **[a daily/weekly update]** from me so you always know where things stand.

Looking forward to making your week lighter!
[Your name]

TEMPLATE 3 · ONBOARDING QUESTIONS

Questions to ask a new client

1. What are the 2–3 tasks you'd most love off your plate first?
2. How do you prefer we communicate (email, Slack, calls) — and how often?

3. What tools/logins will I need, and how should we share them securely?
4. Are there examples of “done well” I can learn from?
5. What does a great week working together look like to you?

TEMPLATE 4 · WEEKLY UPDATE

Keeping them in the loop

Hi **[Client name]**, here's this week's update:

- ✓ Done: **[key things completed]**
- In progress: **[what's underway]**
- ? Need from you: **[any questions/approvals]**

Have a restful weekend!

[Your name]

Consistent updates build trust faster than almost anything else.

TEMPLATE 5 · ASKING FOR A TESTIMONIAL

When they're happy

Hi **[Client name]**,

I've so enjoyed supporting you these past **[weeks/months]**! If you've found my help valuable, would you be willing to share a sentence or two I could use as a testimonial? Even something simple about **[what you helped with and the result]** would mean a lot.

Thank you, always!

[Your name]

“She girdeth her loins with strength, and strengtheneth her arms... she reacheth forth her hands.” — Proverbs 31:17,20