Onboarding & Agency Client Support

This document provides the step by step directions for onboarding new Labor Only OR Labor & PP clients from the intake call to completion.

1) Intake call.
    a) Record basic info into Dubsado and Google Drive. (name, partners name, address, phone number, email, EDD, services requested, any notes) Each inquiry is added to the spreadsheet.

2) Determine which doula to send:
    a) Check the Doula Availability spreadsheet.
    b) Consider the best personality match among available doulas if possible. (If a client has a specific issue, is there a doula best equipped to handle that?)

3) Agency contacts potential doulas who will interview with clients. Send by text or email (written record).
    a) Doula must contact the client to schedule consultation within 1 business day. If not possible, they need to contact the agency office.
    b) Don't give doulas too much information about clients, let them discover who they are and what they need.

4) Doulas set up a date and time to meet via zoom or in person for consultation with clients. *(Preferably within 7 days, maximum 14 days unless extenuating circumstances.)
    a) Doula notifies the agency of consult time so that agency can set up Zoom and send meeting email to all parties for access.

5) Follow up by phone or text with doula about interview within 1-2 business days after zoom consult.

6) Follow up with potential clients by phone within 1-2 business days.

7) Send contract and invoice for deposit via email.

8) Once payment received and contract signed:
    a) Let Client know doula will contact to set up Prenatal Appointment.
    b) Send client email of the FAQ-Labor Support Pdf (located in this Folder)
    c) Add information into the doula availability spreadsheet.
    d) Update Dubsado Acct for client.
    e) Update Clients Google Drive file.