**Onboarding PP Client & Ongoing
Agency Support**

*This document provides the step by step directions for onboarding new **Postpartum Only** clients from the intake call to completion.*

1) Intake call.
    a) Record basic info into Honeybook and Google Drive. (name, partners name, address, phone number, email, EDD, services requested, any notes) Each client has a separate file with all info, communication notes.

2) Find doula by checking the Doula Availability spreadsheet.
    a) Agency contact with doulas who will interview with clients. Sent by text or email (written record).

3) Once doula is confirmed, E-Mail Welcome Packet to client with info about doula who will be doing the consulting. (preferred same business day, must be within 24hrs).

4) Doula sets up a date and time to meet via zoom for consultation with clients.
    a) Preferably within 7 days, maximum 14 days unless extenuating circumstances.
    b) Doula notifies the agency of consultation time so that agency can set up Zoom and send meeting email to all parties for access.
    c) Doula must contact the client to schedule consultation within one business day. If not possible, they need to contact the agency office.
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 the Postpartum Planning Session.
    b) Send client email of the FAQ-Postpartum 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.