

Client Follow-Up Fix Kit



The Creative
Tech Studio

*Find what's missing in your client follow-up and set up one simple welcome flow you can use **today**.*

 **Includes:**

Follow-up Checkup ● Simple Flow Map ● Welcome Email Template



THE CREATIVE TECH STUDIO

*HELPING WOMEN ENTREPRENEURS CONNECT THEIR PASSION WITH
THE ONLINE SYSTEMS THEIR BUSINESS NEEDS TO GROW.*

WWW.THECREATIVETECHSTUDIO.COM

WELCOME TO THE FIX KIT



Hi, I'm Janet. I help women entrepreneurs connect their passion with the online systems their business needs to grow. That could include the behind-the-scenes pieces of your business like email, lead capture, websites, landing pages, funnels, and the foundational systems that help everything work together.

Most women build their business first and their systems later and that's understandable. If your client follow-up feels manual, inconsistent, or unfinished, you're not alone and you're not behind (even though it likely feels that way)

You're just ready for structure.

This kit starts with a ***handy checklist*** that will help you see what a connected follow-up system actually includes, so you can identify what's in place now and what still needs attention.

But it won't stop there - you'll also get a ***simple flow map*** showing how the pieces connect, and a ***welcome email template*** you can use today. A real place to start.

My hope is that this kit brings clarity and momentum - not just insight, with one piece actually in motion. If it reveals unfinished pieces beyond that, don't worry, you don't have to figure them out alone. That's what I'm here for.

Now, let's get started on your client follow-up!

WHEN YOUR AUTOMATION AND CLIENT
JOURNEY ARE CONNECTED, YOUR BUSINESS
FEELS STEADY AND SUPPORTED.

WHAT YOUR CLIENT FOLLOW-UP SYSTEM NEEDS

A connected follow-up system doesn't have to be complicated - but it does need a few foundational pieces working together.

- ☒ Email System Platform - your Contact Hub
- ☒ Automated Follow-Up Flow
- ☒ Clear Lead Capture with Opt-In
- ☒ Intentional Next Step in the Client Journey
- ☒ Organized Contact Management / Segmentation

As you read through each section, simply note whether this piece is fully in place, partially built, or still missing. You don't need to fix anything this second - just notice. Up next, we'll map out what a simple system looks like, and hand you a template to start with.

Email Platform - Your Client Contact Hub

Your email platform is more than a place to store contacts, it's where real connection begins. When someone joins your list, email gives you the opportunity to speak directly to them, build trust over time, and move the relationship deeper than social media ever could. A well-set-up email system creates consistent touchpoints that feel personal and intentional. It becomes the foundation for meaningful client relationships - not just occasional communication.

- ☐ My email platform is set up and organized
- ☐ New subscribers automatically receive a welcome email

WHAT YOUR CLIENT FOLLOW-UP SYSTEM NEEDS



I use a professionally branded email

Automated Follow-Up Flow

Automation isn't about removing connection, it's about protecting it. A simple follow-up flow ensures that when someone joins your list or reaches out, they hear from you in a timely and thoughtful way. Instead of relying on memory or manual effort, automation provides consistency. It helps your business respond professionally and reliably even when you're focused elsewhere.



I am NOT manually sending follow-up messages one by one



When someone joins my list, everything happens automatically



My forms are directly connected to my email platform



I know exactly what happens after someone subscribes

Clear Lead Capture with Opt-In

Lead capture is how someone moves from "interested" to "connected." When there's a clear opt-in, you make it easy for people to take the next step without confusion or hesitation. Without a defined entry point, interest often fades. A strong opt-in gives potential clients a simple way to stay in touch and begin building a relationship with you.

WHAT YOUR CLIENT FOLLOW-UP SYSTEM NEEDS



I have one clear way for people to join my email list



My opt-in clearly explains what they will receive



My lead magnet or offer is delivered automatically



The next step after signing up is obvious

Intentional Next Step in the Client Journey

Every interaction should gently guide someone forward. When your follow-up includes an intentional next step, clients aren't left wondering what to do. They feel supported and confident in moving ahead. An intentional journey removes friction and creates momentum and when people clearly understand what comes next, they're far more likely to engage, invest, and continue the relationship with you. Clarity in the next step doesn't pressure people - it gives them direction. And direction is what turns interest into action.



Every email gently guides readers toward a next step



My follow-up moves people forward instead of just "checking in"



My audience knows how to work with me and doesn't get stalled

WHAT YOUR CLIENT FOLLOW-UP SYSTEM NEEDS

Organized Contact Management / Segmentation

As your list grows, organization becomes essential. Segmentation and tagging allow you to communicate in ways that feel relevant instead of generic. When your contacts are organized, you can send the right message to the right people at the right time - strengthening trust and making your follow-up more effective. This is one of the most underused tools in small business yet it's one of the simplest ways to make your communication feel thoughtful and intentional.



My contacts are tagged or segmented based on interest or behavior



I don't send the same message to everyone on my list



I know where new leads are coming from



I can easily find and organize my contacts when needed

YOUR CLIENT FOLLOW-UP SYSTEM SNAPSHOT

Take a moment to look at the five areas below and mark where you currently stand. This isn't about judgment - it's about clarity.

EMAIL SYSTEM – PLATFORM

- ☐ In Place
- ☐ Partially Built
- ☐ Not Yet Started

AUTOMATED FOLLOW-UP FLOW

- ☐ In Place
- ☐ Partially Built
- ☐ Not Yet Started

CLEAR LEAD CAPTURE WITH OPT-IN

- ☐ In Place
- ☐ Partially Built
- ☐ Not Yet Started

INTENTIONAL NEXT STEP IN THE CLIENT JOURNEY

- ☐ In Place
- ☐ Partially Built
- ☐ Not Yet Started

ORGANIZED CONTACT MANAGEMENT / SEGMENTATION

- ☐ In Place
- ☐ Partially Built
- ☐ Not Yet Started

WHAT YOUR SNAPSHOT REVEALS

If three or more areas are marked ***“Partially Built” or “Not Yet Started,”*** your business isn’t behind - it’s simply ready for structure.

And structure changes everything. When your systems are intentionally built and connected, follow-up becomes consistent, relationships deepen, and growth becomes far more sustainable.



Most women don’t need more ideas or more marketing tactics.

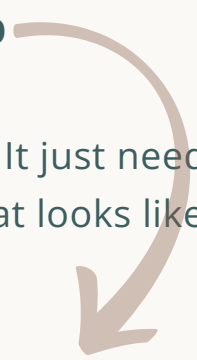
They need someone to help them organize and connect what they’ve already started.

That’s the work I specialize in.

Now that you can see where the gaps are, let's look at what a simple, connected system actually looks like - and get one piece of it working for you today.

→ **Keep going: Here’s Your First Follow-Up Flow Map**

A connected follow-up system doesn't have to be complicated. It just needs a few pieces working together, in the right order. Here's what that looks like in its simplest form:

- 
- A large, light brown curved arrow pointing from the section header down towards the list.
- *Someone opts in → grabs your free resource (or whatever you're offering)*
 - *They get a welcome email → automatic, warm, and personal - not a generic auto-reply.*
 - *They get tagged → labeled in your system as a new lead, so you know exactly who they are and what they're interested in.*
 - *They're invited to a next step → one clear, simple invitation - not a sales pitch, just a next right thing. A sensible step in their customer journey.*

FOLLOW YOUR FLOW MAP

That's it. Four pieces, working together. This is the foundation every connected follow-up system is built on - whether you're just starting out or refining what you already have.

Your First Follow-Up Flow Map

A connected follow-up system doesn't have to be complicated. It just needs a few pieces working together, in the right order. Here's what that looks like in its simplest form:



On the next page, you'll find a **welcome email template** you can customize and use today - the second piece of this flow, ready to go.

CRAFT YOUR FOLLOW-UP EMAIL

*This is the email your new subscriber receives right after they opt in. Yes, it's automated - but it should still feel warm, personal, and helpful. Use the steps below to get one simple welcome email in place. **Your first welcome email does not need to sell everything, explain everything, or prove everything.***

*Its job is to:
deliver what they asked for
introduce you briefly
set a warm expectation
point them toward the next step*

*Don't overthink it. **We're in action mode now**, and the goal is to **get one simple welcome email in place and working for you.***

Step 1: Copy the subject line

Subject line:

Here's your [freebie name]

TIP: Keep the subject line short and clear, 6-7 words is a good guideline.

Step 2: Paste the email body

Copy the email on the next page into your email platform. If you can include a photo of yourself in the email - that's a great way to connect even more.

TIP: You can use it exactly as written, fill in the brackets, and adjust anything that needs to sound more like you.

Step 3: Fill in the brackets

Before you turn this email on, replace:

[First Name]

[freebie name]

[LINK]

[your name]

[your audience]

[what you do]

[what's coming]



1. Subject Line → 2. Email Body → 3. Test + Send

TIP: Send yourself a test email and click the download link to make sure everything works.

CRAFT YOUR FOLLOW-UP EMAIL

Hi **[First Name]**,

Thanks so much for grabbing [freebie name] - I hope you find it helpful! **[One sentence on what this download helps them do.]**

Here's your download: **[LINK]**

A little about me - I'm **[your name]**, and I help **[your audience]** with **[what you do]**.

[One sentence on why you do this work or who you love helping.]

Over the next couple of weeks, I'll send you a few more emails with **[what's coming — a story, a tip, an invitation, etc. Keep this honest to what you'll actually send.]**

In the meantime, if you have any questions, just hit reply - I read every email.

Talk soon,
[Your name]



YOU DID IT!

If you've made it this far, that tells me something important. You care about how your business feels and how your clients experience it. You didn't just read a **checklist** today. You **mapped** out what a real follow-up system looks like, and you have a **welcome email** ready to use. That's a real piece of your foundation, in place.

It's important to know that when your automation and client journey are intentionally connected, everything begins to feel steadier. Follow-up becomes consistent. Communication becomes purposeful. Growth becomes more sustainable. And that changes the way your business supports you.

Follow-up is just one piece, though - your website, lead capture, offers, and contact systems all work together too. If this *Fix Kit* helped you see what's missing in your client follow-up, **From Scattered to Set Up** will help you look at the bigger picture and know which part of your online setup needs your attention first.

From Scattered to Set Up is a **5-part video toolkit** for small business owners who know they need a better online setup, but aren't sure what to do first. We'll walk through the **five online pieces every small business needs working together**. By the end, you'll have a clearer picture of what's already working, what's missing, and which piece to focus on first to connect with customers online.

→ Explore **From Scattered to Set Up**

And if you're ready for real support as you build it out - not just information, but an actual space to ask questions and get unstuck - **Small Business Studio** is a guided space online in a private group to do that alongside me and other women doing the same thing.

→ **Learn about the 'Small Business Studio'** (guided support in our group membership format)

→ **Explore 'The Tech Relief Package'** (your online systems done for you)

When you're ready, I'm here. Janet Farmer