Recommended Tools — Client Intake

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Contents

As you get started building out your Client Intake System, you'll need the following type of tools:

Client Intake Form

This is the application form that a prospect fills out when they apply to work with you. This is the defined entrance on your website.

- › Wufoo
- › Typeform
- › Gravity Forms

Email Template Manager

This is a template manager that you use to store emails that you send to prospects in communication.

- › Yesware
- › Streak

Email Scheduling Tool

This is a tool that you use to schedule emails that you send — or that you use to remind yourself of emails that you need to respond to.

› Yesware

› Streak

› Boomerang for Gmail

Email Marketing Platform *(Optional)*

This is an optional tool that you can connect to your Client Intake Form so that when a prospect fills out the form to work with you, they're added to an automated sequence of emails that educates, nurtures, and qualifies them to work with you.

› GetDrip

- › MailChimp

- › ConvertKit

Calendar Booking Tool

This is a booking tool that you use to allow prospects — who qualify — to schedule a time to talk with you.

- › Calendly

- › Time Trade

- › Schedule Once

Paid Call Tool

- › Clarity.fm

- › Moon Clerk

My Favorite Tools

Out of these, I personal use (and recommend) the following collection. This is all you need to get started.

› **Client Intake Form** — Gravity Forms if you're on WordPress, otherwise Wufoo

› **Email Template Manager** — Yesware

› **Email Scheduling** — Streak

› **Email Marketing Platform** — Get Drip

› **Booking Tool** — Calendly

› **Paid Calls** — Clarity.fm