



BOOKING & ONBOARDING SYSTEM

Coaching and Consulting

A complete, branded client journey from discovery call to testimonial.

Included: booking page, intake form, client agreement, payment workflow, welcome pack, preparation form, workbook, progress tracker and feedback form.

Prepared for Baobab Advisory Group

A. SYSTEM OVERVIEW

The full client journey and internal workflow

Client Journey

Stage	Action	Outcome
1	Discover	Visitor lands on the coaching or consulting page and reviews the offer.
2	Book	Prospect selects a discovery-call time and answers short qualification questions.
3	Assess	Baobab reviews the enquiry and runs the discovery call.
4	Agree	Suitable clients receive a proposal, client agreement and payment link.
5	Onboard	After signing and payment, the welcome pack, intake questionnaire and tracker are issued.
6	Deliver	Each session uses a preparation form, action plan and workbook exercises.
7	Review	Progress is measured at agreed intervals and the programme is adjusted.
8	Close & Grow	The client completes feedback, provides a testimonial and receives next-step recommendations.

Recommended Automation

Booking confirmed: Send calendar confirmation, video-call link and reminder schedule.

Discovery call completed – suitable: Send proposal, agreement and payment link.

Agreement signed + payment received: Send welcome email, welcome pack, intake form and progress tracker.

48 hours before each session: Send session preparation form and reminder.



After each session: Send notes, agreed actions and next-session date.

Mid-programme: Send progress review form.

Programme complete: Send final review, feedback and testimonial request.

Internal Status Labels

- ☐ New enquiry
- ☐ Discovery call booked
- ☐ Qualified
- ☐ Proposal sent
- ☐ Agreement sent
- ☐ Awaiting payment
- ☐ Onboarding
- ☐ Active client
- ☐ Paused
- ☐ Completed
- ☐ Follow-up / renewal

1. DISCOVERY-CALL BOOKING PAGE

WordPress-ready copy and form structure

Page Title

Book Your Complimentary Discovery Call

Hero Copy

A focused conversation to understand where you are, what you want to achieve and whether Baobab Advisory Group is the right partner to support your next step.

Choose a suitable time below. You will answer a few short questions so we can make the call practical and relevant from the start.

Who This Call Is For

- ☐ Professionals seeking career clarity, confidence or a practical job-search strategy.
- ☐ Individuals looking for structured life coaching and accountability.
- ☐ Business owners or leaders who need support with growth, people, marketing, recruitment or operations.
- ☐ Organisations seeking tailored consulting, workshops or advisory support.

What Happens on the Call

- ☐ We clarify your immediate priorities and desired outcomes.
- ☐ We identify the main barriers, risks and opportunities.
- ☐ We discuss the most suitable service or programme.
- ☐ You receive clear next steps, with no obligation to proceed.

Booking Form Fields

- ☐ Full name
- ☐ Email address
- ☐ Mobile number
- ☐ Country and time zone
- ☐ Service of interest
- ☐ Current role or business
- ☐ Primary challenge
- ☐ What would a successful outcome look like?



- ☐ How soon would you like to begin?
- ☐ Preferred communication method
- ☐ Consent to receive booking and service-related communication

Booking Page CTA

Select Your Discovery-Call Time

Confirmation Message

Thank you for booking with Baobab Advisory Group. Your confirmation and meeting details are on their way to your inbox. Please complete the short pre-call questions before we meet so we can use the time well.

Integration Placeholders

Booking calendar embed code or URL:

Video meeting platform:

CRM or contact-list destination:

2. CLIENT INTAKE QUESTIONNAIRE

Complete after acceptance and before the first paid session

Client Details

Full name:

Preferred name:

Email:

Mobile:

Location and time zone:

Emergency contact (optional):

Selected service / programme:

Start date:

Preferred session day and time:

Your Starting Point

1. What prompted you to seek coaching or consulting support now?

2. Briefly describe your current situation.

3. What is working well at present?



4. What feels unclear, difficult or stuck?

5. What have you already tried?

6. What would you most like to change over the next 3–6 months?

7. What would make this engagement feel successful?

8. What may prevent you from following through?

9. What type of support helps you perform at your best?

10. How do you prefer to receive direct feedback?

11. What should your coach or consultant understand about you, your business or your circumstances?

Goals and Measures

Priority Goal	Why It Matters	Measure of Success	Target Date



Readiness and Commitment

On a scale of 1–10, how ready are you to make changes? Why?

How much time can you realistically commit each week?

What accountability approach would be most useful?

Important Disclosure

Coaching is a goal-focused development service and consulting provides professional guidance based on information supplied by the client. Neither service replaces medical, psychological, legal, financial or other regulated professional advice. Please tell Baobab Advisory Group if another type of professional support would be more appropriate.

Client name:

Date:

3. CLIENT AGREEMENT TEMPLATE

Adapt the commercial details for each service and obtain local legal review before use

This Client Agreement is entered into between Baobab Advisory Group (“Baobab”) and the client named below (“the Client”).

Client legal name:

ID / company registration number (where applicable):

Billing address:

Email:

Service or programme:

Start date:

Number and length of sessions:

Programme term:

Total fee:

Payment schedule:

1. Scope of Services

Baobab will provide the coaching or consulting services described in the accepted proposal, service page or written programme summary. Any work outside that scope must be agreed in writing and may incur an additional fee.



2. Client Responsibilities

The Client agrees to provide accurate information, attend sessions on time, complete agreed actions where reasonably possible, communicate changes promptly and take responsibility for decisions and implementation.

3. Fees and Payment

Fees are payable according to the schedule above. Sessions, deliverables or access may be paused where payment is overdue. Bank, platform, currency-conversion or transaction fees are for the Client unless otherwise agreed.

4. Scheduling and Cancellations

The Client should provide at least 24 hours' notice to reschedule. Late cancellations or missed sessions may be treated as used, except where Baobab agrees otherwise due to exceptional circumstances.

5. Refunds

Fees for completed work, delivered digital resources and used sessions are non-refundable. Any refund for unused services is subject to the agreed programme terms and applicable law.

6. Confidentiality

Both parties will keep confidential information private and use it only for the engagement, except where disclosure is required by law or necessary to prevent serious harm. Baobab may use secure service providers to administer the engagement.

7. Intellectual Property

Baobab retains ownership of its frameworks, templates, workbooks and materials. The Client receives a personal or internal-business licence to use delivered materials and may not resell, reproduce or distribute them without written permission.

8. Results and Decisions

Baobab does not guarantee a specific employment, income, business, relationship or personal outcome. The Client remains responsible for all decisions, actions and results.

9. Professional Boundaries

Coaching and consulting are not substitutes for therapy, medical care, legal advice, financial advice or other regulated services. Baobab may recommend that the Client seek specialist support where appropriate.



10. Data Protection

Personal information will be used to deliver and administer the service, process payments, communicate with the Client and meet legal obligations. It will be handled in line with Baobab's privacy policy and applicable data-protection law.

11. Termination

Either party may end the engagement in writing. Outstanding fees for work completed or committed remain payable. Baobab may terminate immediately for abusive behaviour, unlawful requests, serious non-payment or conduct that makes the engagement unsafe or unworkable.

12. Dispute Resolution and Governing Law

The parties will first try to resolve concerns in good faith. The governing law and jurisdiction should be inserted after local legal review.

Important: This template is a practical starting point and is not legal advice. Have it reviewed by a qualified legal professional for the jurisdictions in which Baobab operates and serves clients.

Client signature:

Client name and date:

For Baobab Advisory Group:

Name and date:

4. INVOICE & PAYMENT-LINK WORKFLOW

A simple process from accepted proposal to paid onboarding

Payment Options

- ☐ Full payment before programme start
- ☐ Deposit followed by scheduled instalments
- ☐ Monthly retainer paid in advance
- ☐ Single-session payment at booking
- ☐ Corporate invoice payable within the agreed period

Invoice Fields

- ☐ Baobab legal / trading details and contact details
- ☐ Client name and billing details
- ☐ Unique invoice number
- ☐ Invoice and due dates
- ☐ Service description and delivery period
- ☐ Subtotal, tax and total due
- ☐ Currency
- ☐ Payment method and link or bank details
- ☐ Cancellation / refund reference
- ☐ Payment reference instruction

Payment Email Template

Subject: Your Baobab Advisory Group programme – agreement and payment

Hello [Client First Name],

Thank you for choosing Baobab Advisory Group. Attached is your client agreement and invoice for [service / programme].

Please complete the following by [date]:

1. Review and sign the agreement.
2. Pay securely using this link: [PAYMENT LINK].
3. Reply if your billing details need to be changed.



Once the signed agreement and payment are received, we will send your welcome pack, intake questionnaire and first-session preparation details.

Kind regards,
Baobab Advisory Group
[website] | [email] | [phone]

Payment Link Register

Offer	Price / Currency	Payment URL	Notes
Discovery / strategy session			
Career coaching package			
Life coaching package			
Business coaching package			
Consulting project deposit			
Monthly consulting retainer			



5. CLIENT WELCOME PACK

Send immediately after agreement and payment

Welcome to Baobab Advisory Group

Thank you for trusting us to support your next stage of growth. This engagement is designed to give you a clear structure, practical actions and honest support. The strongest results come from open communication, preparation and consistent follow-through.

Your Programme at a Glance

Programme / service:

Coach or consultant:

Start date:

Programme end / review date:

Session frequency:

Session duration:

Meeting link:

Primary contact email:

Normal response time:

Emergency / urgent matters policy:

Before Your First Session

- ☐ Complete the full intake questionnaire.
- ☐ Add all confirmed sessions to your calendar.



- ☐ Review the client agreement and programme scope.
- ☐ Identify your three most important desired outcomes.
- ☐ Bring any relevant documents, data, CVs, plans or reports.
- ☐ Set aside uninterrupted time and join from a suitable environment.

How Sessions Work

- ☐ We begin by reviewing progress, priorities and changes since the last session.
- ☐ We focus on the highest-value issue for that session.
- ☐ We agree practical actions, owners and deadlines.
- ☐ You record insights and actions in the workbook and tracker.
- ☐ Between-session support is limited to the agreed service scope.

Communication Guidelines

Use [EMAIL / CLIENT PORTAL / WHATSAPP] for normal communication. Messages are usually answered within [RESPONSE WINDOW] on business days. Coaching or consulting support is not an emergency service. For urgent medical, safety or mental-health concerns, contact an appropriate local professional or emergency service.

Rescheduling

Use [RESCHEDULING LINK] or email [CONTACT EMAIL]. Please provide at least 24 hours' notice where possible. The terms in the signed agreement apply to missed or late-cancelled sessions.

What to Expect from Baobab

- ☐ Professional preparation and focused sessions
- ☐ Respectful, direct and confidential communication
- ☐ Practical tools and structured accountability
- ☐ Clear boundaries and honest recommendations
- ☐ A commitment to work toward the outcomes agreed together

What We Need from You

- ☐ Honesty about your situation, needs and progress
- ☐ Timely attendance and preparation
- ☐ Ownership of decisions and agreed actions
- ☐ Feedback when an approach is not working
- ☐ Respectful communication and payment in line with the agreement

6. SESSION PREPARATION FORM

Complete 24–48 hours before each session

Client name:

Session number:

Session date:

Programme / service:

1. What progress have you made since the last session?

2. Which actions did you complete?

3. Which actions remain incomplete, and why?

4. What wins or positive changes should we acknowledge?

5. What challenge needs the most attention now?

6. What decision, outcome or clarity would make this session valuable?

7. What relevant information, documents or data should be reviewed?

8. How would you rate your current energy or capacity from 1–10?



9. Is there anything important that has changed since we last met?

Proposed Session Focus

- ☐ Goal review
- ☐ Mindset / confidence
- ☐ Decision-making
- ☐ Career strategy / job search
- ☐ Leadership / people
- ☐ Business growth
- ☐ Marketing / sales
- ☐ Recruitment / hiring
- ☐ Systems / operations
- ☐ Accountability / execution
- ☐ Other: _____

7. COACHING & CONSULTING WORKBOOK

A reusable framework for clarity, action and reflection

1. Vision and Desired Outcome

Describe the result you want to create in clear, specific terms.

Why does this matter now?

What will be different when this is achieved?

2. Current Reality

What is happening now? Include facts, not only assumptions.

What is working and should be protected?

What is not working?

3. Barriers and Root Causes

What are the visible barriers?



What may be causing or reinforcing them?

Which barrier is within your control?

4. Strengths and Resources

Which strengths, skills, relationships or resources can help?

5. Options

Option	Benefits	Risks / Cost	First Test

6. Decision

What have you decided?



Why is this the best next step?

What will you stop, start and continue?



7. 30-Day Action Plan

Action	Owner	Due Date	Success Measure	Support Needed	Status

8. Weekly Reflection

What did I complete?

What moved forward?

What did I learn?

What did I avoid or delay?

What is the most important next action?



What support do I need?

9. Confidence and Commitment Check

Confidence that I can complete the next actions (1–10):

Commitment to completing them (1–10):

What would increase either score by one point?

8. PROGRESS TRACKER

Use the accompanying Excel workbook throughout the engagement

Tracker Structure

- ☐ Dashboard: programme status, goal progress, completion rate and next session.
- ☐ Client Profile: contact, programme, baseline and target information.
- ☐ Goals: outcomes, measures, target dates, baseline and current score.
- ☐ Session Log: focus, key insights, decisions and next steps.
- ☐ Action Plan: owner, due date, status, priority and evidence.
- ☐ Milestones: important achievements and programme checkpoints.
- ☐ Feedback Log: client observations and adjustments throughout the programme.

Review Rhythm

- ☐ Update actions after every session.
- ☐ Review goals at least monthly or at programme midpoint.
- ☐ Record evidence of progress, not only general impressions.
- ☐ Discuss overdue actions without judgement and agree a realistic reset.
- ☐ Use the final dashboard as part of the programme review and testimonial request.

9. FEEDBACK & TESTIMONIAL FORM

Collect at the midpoint and completion of the engagement

Client name:

Programme / service:

Coach or consultant:

Review date:

Statement	1	2	3	4	5
The service was clearly structured.	☐	☐	☐	☐	☐
Sessions focused on my priorities.	☐	☐	☐	☐	☐
The support was practical and relevant.	☐	☐	☐	☐	☐
I felt listened to and respected.	☐	☐	☐	☐	☐
I made meaningful progress toward my goals.	☐	☐	☐	☐	☐
I would recommend Baobab Advisory Group.	☐	☐	☐	☐	☐

What was most valuable about the engagement?

What changed for you or your business?



What specific result, improvement or insight did you gain?

What could we improve?

What support would be useful next?

Testimonial Permission

- ☐ Yes, Baobab may publish my testimonial with my full name and role / company.
- ☐ Yes, Baobab may publish my testimonial using my first name and role / industry only.
- ☐ Yes, Baobab may publish my testimonial anonymously.
- ☐ No, please keep my feedback private.

Please write your testimonial in your own words:

- ☐ Baobab may make minor spelling or grammar edits without changing the meaning.
- ☐ Baobab may use this testimonial on its website, social media, proposals and marketing materials.

Signature:

Date:



10. ADMINISTRATION CHECKLIST

Internal quality-control checklist for every client

Before the Discovery Call

- ☐ Booking captured in calendar
- ☐ Contact record created
- ☐ Qualification answers reviewed
- ☐ Reminder sent
- ☐ Relevant service notes prepared

After a Successful Discovery Call

- ☐ Call outcome recorded
- ☐ Proposal or scope prepared
- ☐ Agreement personalised
- ☐ Invoice and payment link prepared
- ☐ Follow-up sent with deadline

Once Client Accepts

- ☐ Signed agreement saved
- ☐ Payment confirmed
- ☐ Welcome email sent
- ☐ Welcome pack sent
- ☐ Intake form sent
- ☐ Tracker created
- ☐ Sessions booked

During Delivery

- ☐ Preparation form received
- ☐ Session notes completed
- ☐ Actions updated
- ☐ Resources sent
- ☐ Progress reviewed
- ☐ Risks / scope changes documented



At Completion

- ☐ Final progress review completed
- ☐ Outstanding resources delivered
- ☐ Feedback form sent
- ☐ Testimonial consent captured
- ☐ Renewal / next-step offer sent
- ☐ Client record archived securely

Personalisation Fields to Complete Before Launch

Website URL:

Primary email:

Phone / WhatsApp:

Booking link:

Video meeting link:

Payment gateway links:

Privacy policy URL:

Terms / refund policy URL:

Rescheduling link:

Business hours and response time:

Governing law / jurisdiction:
