



Onboarding Agent

Sends a personalised welcome email sequence when a new user registers. Fully automated.

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1 AT A GLANCE

AREA	Support
TRIGGER	A new sign-up for your product or offer
RESULT	A personal welcome sequence for every new user
INTEGRATIONS (EXAMPLES)	Sign-up form / app Gmail / email tool Notion / Airtable

2 HOW THE WORKFLOW RUNS



1 Detect the sign-up

As soon as someone signs up, the agent receives the details from your sign-up form or app.



2 Say welcome

Within minutes a personal welcome email goes out with their name and the most important first steps.



3 Start the sequence

Further emails follow at set intervals, for example with tips, guides or answers to typical questions.



4 Tailor the content

Optionally, the content adapts to the user's details, such as their industry or chosen plan.



5 Hand over to you

If a user replies or asks a question, the message goes straight to you.

New users feel looked after from day one — fully automated.

IDEAL FOR

- ✓ SaaS products, apps and online offers with sign-up
- ✓ Coaches and service providers with new clients
- ✓ Anyone who wants new users to reach their first success faster

CUSTOMISABLE

- ✓ Number, timing and content of the emails
- ✓ Personalisation based on user details
- ✓ Sender, language and tone

WHAT YOU NEED

- ✓ A source for new sign-ups (form, app or database)
- ✓ An email account or email tool for sending
- ✓ The content of the welcome emails (I help with drafts)

PRIVACY & SECURITY

- ✓ Only the details needed for onboarding
- ✓ Unsubscribe link in every email
- ✓ Sent from your own sender address

YOUR CONTROL You approve all texts in advance. The agent only sends what you signed off.

This describes the typical process. Every workflow is adapted to your tools, processes and requirements during the project; details and pricing are agreed individually.

Interested in this workflow?

In a free intro call we look at how the workflow can be adapted to your tools.

Book an intro call