

AUTOMATE
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VIP

CUSTOMER EXPERIENCE PLAYBOOK

The VIP Customer Onboarding Sequence

This **VIP Onboarding Sequence** is your **starting point**—a framework to help you build stronger relationships with your customers, create an incredible experience, and set the foundation for **repeat sales & referrals**.

Customize It:

- Adjust the timing to match your product's lifecycle.
- Add or remove messages based on what makes sense for **YOUR** business.
- Use these templates as inspiration—expand on them, tweak the language, and make them **sound like YOU**.

At the end of the day, **think back to when you first started using [Product]**—what support, guidance, or encouragement would have helped **YOU** the most?

That's exactly what your customers need from you.

So go all in. Show up for them. Deliver an experience they'll rave about.

Because happy customers **don't just buy once—they come back, refer friends, and grow your business FOR you.**

Let's make it happen!



STEP 1: BRAIN DUMP YOUR ONBOARDING PLAN

Before we dive into your **VIP onboarding sequence**, let's **get clear on what your customers need!** Answer these questions to guide your messaging:

Customer Journey & Experience

✓ What's the first thing your customer should do when they get their product? (Unbox it? Prep it? Take a "before" photo? Do a patch test? Log into something?)

✓ What are the top 3 mistakes people make when using this product? (For example: Using too much, applying it incorrectly, expecting instant results, etc.)

✓ What common fears or hesitations might they have? (Worried about side effects? Skeptical it will work? Unsure how to use it?)

✓ What encouragement or reminders will help them stay consistent? ("Results take time!" "Trust the process!" "Here's what to expect after 7 days!")

Content & Value

✓ What's something they don't know yet about your product that would excite them? (For example: A hidden benefit, a unique ingredient, a cool hack for better results?)

✓ What's a small win they'll experience early on? (Example: "After just 3 days, you'll notice..." "Your skin might feel X, but that means it's working!")

✓ What's an outside resource you can link to? (A podcast, a book, a mindset tip, an expert's video, etc.)

✓ What encouragement or reminders will help them stay consistent? ("Results take time!" "Trust the process!" "Here's what to expect after 7 days!")

STEP 1: BRAIN DUMP YOUR ONBOARDING PLAN

**What tutorials, tools, or communities
do you have?**

(FB Group, YouTube, FAQ page?)

**What additional products complement
their purchase?**

(Upsells? Bundles?)

**What are 4+ value-based messages
you can send?**

(Recipes, workouts, styling ideas, self-care tips?)

**What incentives will you offer for
engagement?**

(Giveaways, discounts, exclusive content?)

**How will you encourage testimonials &
referrals?**

(When will you ask? What's the incentive?)

Once you've answered these, you're ready to **map out your full
VIP sequence!**

DAY 1

Welcome & What to Expect

What to Include:

- ✓ Thank them for their order!
- ✓ Let them know what to expect from your texts/emails.
- ✓ Ask them to **save your number** in their phone.
- ✓ Encourage them to **reply so you know they received it**.

SMS Example:

"Thank you for your order! Save this number as '[Your Name]: [Your Biz Name]' so you don't miss my best tips!

Over the next 30 days, I'll send **quick, helpful tips** so you get the best results from [Product]!

Reply 👍 so I know you got this!"

Notes

Email Example:

Subject: Welcome! Let's Get Started

Hey [First Name]!

I just wanted to personally say **THANK YOU** for your order! I can't wait for you to experience [Product] —you're going to love it.

What to Expect:

- ✓ Over the next few weeks, I'll send **tips & resources** to help you get the best results.
- ✓ You can **reply to this email anytime**—I'm here for you!
- ✓ Join our **VIP Community** for extra support: [Insert Link]

ACTION STEP: Reply & tell me **what made you grab this product**—I'd love to hear!

Talk soon,
[Your Name]



DAY 3

Prepping for Their Product

What to Include:

- ✓ Help them **prepare for their order to arrive**.
- ✓ Share a "**What to Do First**" tip (storage, ingredients, usage).
- ✓ Address a **common mistake** they should avoid.

SMS Example:

"Your order is on the way! Quick tip:
To get the best results, make sure
you [insert tip]!"

Any questions before it arrives?
Reply & ask me!"

Notes

Email Example:

Subject: Your [Product] is on the
Way—Let's Get Ready!

Hey [First Name]!

Your order is on the way! **Here's
how to prepare for the BEST
results:**

✓ **[Tip 1]** – [Example: Store in the
fridge for max freshness.]

✓ **[Tip 2]** – [Example: Drink first
thing in the morning for energy all
day!]

✓ **[Common Mistake to Avoid]** –
[Example: Don't mix with hot water
—it kills the active ingredients!]

Any questions? Just hit reply! I'm
here to help.

[Your Name]



DAY 5

Tools, Community, & Tutorials

What to Include:

- ✓ Share the **best resources** (FB group, YouTube, Guides, Tutorials).
- ✓ Point them to **FAQs** or **Common Mistakes**.
- ✓ Encourage them to **comment in the group or engage with a tutorial**.

SMS Example:

"I just tagged you in a post inside our **VIP Group** that walks you through exactly how to use [Product]

Jump in & comment 'DONE' when you've checked it out. [Insert Link]"

Notes

Email Example:

Subject: VIP Resources: Start here!

Hey [First Name]!

Did you know that **90% of people see better results** when they're part of a supportive community?

I just dropped **some amazing resources** inside our group to help you [achieve result].

Check them out here: [Insert Link]

I also put together a quick **tutorial video** for you—watch it here: [Insert Link]

Got questions? Just hit reply!

[Your Name]



DAY 7

Encouragement & What's Coming Next

What to Include:

- ✓ Remind them **WHY they bought** this product.
- ✓ Set **expectations for results**.
- ✓ Get them excited about what's next.

SMS Example:

"Big things are coming, [First Name]! Stay consistent with [Product], and you'll start noticing [benefit]!"

Excited? Reply 'YES' & let me know!"

Notes

Email Example:

Subject: Stick with It—Results Are Coming!

Hey [First Name]!

Just a quick reminder: **You made the BEST decision by grabbing [Product]!**

Most people start noticing [Benefit] after **[timeframe]**, so stay consistent & trust the process!

Coming Next: I'll be sending a [tip/tutorial/etc.] to help you even more! Keep an eye out!

Let me know if you have any questions!

[Your Name]



DAY 8

Order Arrival & First Steps

What to Include:

- ✓ Let them know **their package should be arriving soon!**
- ✓ Share a **quick tutorial or tip** for best results.
- ✓ Encourage them to **tell you when their order arrives.**
- ✓ Share a **customer win/testimonial** to build excitement.

SMS Example:

"OMG, your order should be arriving any day now!

Here's a **quick tutorial** to get started: [Insert Link]

Also—did you see [Customer Name]'s transformation in the group?! So excited for you to start!"

Notes

Email Example:

Subject: Your Order is Almost Here!
Let's Get You Ready

Hey [First Name]!

Your package should be arriving **any day now!**

Before it arrives, here's how to get started:

✓ **[Step 1]** – [Example: Store in a cool, dry place.]

✓ **[Step 2]** – [Example: Start with [dosage] for the first few days to let your body adjust.]

✓ **[Pro Tip]** – [Example: Drink on an empty stomach for the best absorption.]

ACTION STEP: Let me know the second it arrives! I'd love to celebrate with you!

[Your Name]

DAY 10

The Unboxing & Social Proof

What to Include:

- ✓ Encourage them to **snap a pic or share an unboxing video**.
- ✓ Offer an **incentive for tagging you** (giveaway, sample, bonus).
- ✓ Introduce your **referral or rewards program**.

SMS Example:

"Your order should be in your hands by now!

Wanna WIN [Free Product, Discount, etc.]?

Snap a pic or unboxing video & tag me on IG/FB—each tag = 1 entry!"

Notes

Email Example:

Subject: Unboxing Challenge: Win [Incentive]!

Hey [First Name]!

By now, your order should have arrived—yay!

I'd LOVE to see your unboxing moment! Plus, I'm giving away **[Free Product, Discount, Bonus, etc.]** to one lucky customer this week!

HOW TO ENTER:

- ✓ Snap a pic or video of your order
- ✓ Post it on IG/FB & tag me **@[YourHandle]**
- ✓ Each tag = 1 entry!

I'll pick a winner on [date]!

Enjoy your order, and let me know if you have any questions!

[Your Name]

DAY 14

Value Tip #1: Enhance Their Results

What to Include:

- ✓ Remind them **WHY they bought** this product.
- ✓ Set **expectations for results**.
- ✓ Get them excited about what's next.

SMS Example:

"Time for a **pro tip**!

Want to **double the benefits** of [Product]? Pair it with **[Additional Product or Habit]** for even better results!

Have you tried this yet? Reply YES/NO!"

Notes

Email Example:

Subject: Quick Tip: Get Even More Out of Your [Product]!

Hey [First Name]!

Here's a **quick tip** to maximize your results with [Product]:


✓ **[Tip 1]** – [Example: If you take it in the morning, pair it with [Other Product] for an energy boost!]

✓ **[Tip 2]** – [Example: Use it [frequency] for best long-term benefits.]

Have you tried this yet? **Hit reply & let me know!**

P.S. Did you check out our **VIP Group** yet? Tons of tips & inspo inside: [Insert Link]

[Your Name]



DAY 18

Check-In & Questions

What to Include:

- ✓ Ask **how they're feeling so far**.
- ✓ Offer to **answer any questions**.
- ✓ Reassure them if they're not seeing immediate results.

SMS Example:

"You're halfway through your first month with [Product]—how are you feeling?!"

Any questions? Anything I can help with?"

Notes

Email Example:

Subject: Checking in—How's it going?

Hey [First Name]!

You've been using [Product] for about **two weeks now**—I'd love to hear how you're feeling!

- ✓ Are you noticing [Common Benefit]?
 - ✓ Do you have any questions?
 - ✓ Need any tips or support?
- I'm here for you—just hit reply!

[Your Name]

DAY 20

Value Tip #2: Community & Extra Support

What to Include:

- ✓ Introduce a **community or group for ongoing support**.
- ✓ Share **another value-based tip** to keep engagement high.

SMS Example:

"Need more tips & inspo? Join our **VIP Group** where members share their wins, recipes, & success stories!

Here's the link: [Insert Link]"

Notes

Email Example:

Subject: Need More Support? Join Our VIP Group!

Hey [First Name]!

Did you know **customers who stay plugged in** get the BEST results?!

Come join our **VIP Group** where we share:

- ✓ Recipes & Hacks
- ✓ Success Stories
- ✓ Bonus Tips & Q&A

Join here: [Insert Link]

[Your Name]



DAY 23

Product Upsell

What to Include:

- ✓ Introduce a complementary product that enhances their results.
- ✓ Use FOMO or bundle incentives to encourage action.

SMS Example:

"Most people using [Product] also love [Additional Product]—it helps with [Benefit]!"

Want the details? Reply 'INFO' & I'll send them over!"

Notes

Email Example:

Subject: Want Even Better Results? Try This...


Hey [First Name]!

I wanted to share **one more pro tip**—most customers LOVE pairing [Product] with [Additional Product] because it helps with **[Benefit]**.

I have a **special bundle** this week—reply 'INFO' & I'll send the details!

Let me know if you want in!

[Your Name]



DAY 25

Feedback & Testimonials

What to Include:

- ✓ Ask them what they love most about the product.
- ✓ Encourage them to leave a review or testimonial.

SMS Example:

"Hey [First Name]! I'd love to hear—**what's been your FAVORITE part** of using [Product] so far?

Reply & let me know!"

Email Example:

Subject: Quick Question for You!

Hey [First Name]!

You've been using [Product] for almost a month—I'd **LOVE to hear your feedback!**

What's been your **favorite benefit so far?** Have you noticed any big changes?

If you have a **quick minute**, leaving a short review would mean the world to me!

Drop your thoughts here: [Insert Link]

Thanks so much!

[Your Name]

Notes

EXTRA: Hero Product Mini-Sequence (3 Value-Driven Messages)

Perfect for:

- ✓ Products that require a bit of education (skincare, supplements, wellness, tech, etc.)
- ✓ A hero product that people need to use correctly for best results
- ✓ Giving customers small “wins” that make them stick with it

Message #1 – Quick Start + Best Practices

When to Send: Right after purchase or within 24 hours.

Goal: Set expectations, get them excited, and help them start **the right way**.

Example (Wellness Product – Greens Powder):

“Your [Product Name] is on its way! **Before you take your first scoop, here’s a pro tip:**

- **Mix it with cold water or juice** for the best taste!
- **Shake, don’t stir**—it blends best in a shaker bottle.
- **Take it first thing in the morning** for max benefits!

Want my **favorite 5-second recipe** to make it even tastier? Reply **RECIPE** and I’ll send it over!”

Message #2 – Common Mistakes & How to Avoid Them

When to Send: 3–5 days after first message.

Goal: Keep them using the product & prevent common drop-off points.

Example (Skincare Product – Vitamin C Serum):

"Are you using your [Product Name] the right way? Here are **3 quick mistakes** people make (so you can avoid them!):

- **Applying too much** – A little goes a long way! 2–3 drops is plenty.
- **Not using sunscreen** – Vitamin C boosts glow, but sunscreen locks it in & protects.
- **Rubbing too hard** – Pat it into the skin for better absorption.

Want to see a quick demo? I made a **1-minute tutorial** showing my routine! Reply **GLOW** and I'll send it over!"

Message #3 – Bonus Hack + Extra Value

When to Send: 7 – 10 days after second message

Goal: Get them to stay consistent & deepen their experience.

Example (Productivity Tool – Digital Planner):

"Let's take your productivity to the next level! **Here's a pro tip to maximize your planner:**

- Use the **Sunday Reset Method**—take 10 minutes to plan your week, set top 3 priorities, and brain dump ideas.
- Pair it with **time blocking**—set specific time slots for deep work & breaks.
- Create a **daily wins list**—track small victories to stay motivated.

Want my full **Productivity Power Guide** with even more hacks? Reply **FOCUS** and I'll send it your way!"

Next Steps: Time to Put Your Plan into Action!

Once you've mapped out your onboarding messages—now it's time to bring them to life! Here's how to finalize your sequence so we can get it working for you:

1. Decide on Your Sending Schedule

Think about how often you want to check in with your new customers. A general guide:

- ✓ Day 1: Thank you & next steps
- ✓ Day 3-5: Support & resources
- ✓ Day 7-10: Unboxing & engagement
- ✓ Day 15+: Value, check-ins & product recommendations

Are you sending messages **daily, every few days, or weekly?** Pick a pace that feels natural and supportive—not overwhelming!

2. Choose Your Delivery Method

Will you send your messages via **SMS, email, or a combination of both?** Here's a quick tip:

SMS: Best for quick check-ins, reminders, and engaging responses.

Email: Perfect for deeper value, tutorials, testimonials, and educational content.

Example Hybrid Approach:

- ✓ Day 1: SMS (Welcome & what to expect)
- ✓ Day 3: Email (Resources & tutorials)
- ✓ Day 5: SMS (Shipping update & hype!)
- ✓ Day 10: Email (Value-driven tip + offer)
- ✓ Day 15: SMS (Check-in & engagement)

3. Organize Everything in a Google Doc

In order for us to easily set them up for you, map them out clearly in a Google Doc for easy reference.

Example Layout:

Day #1

- ✉ SMS: Thank you message + what to expect

Day #3

- ✉ Email: Link to resources & tutorial video

Day #7

- ✉ SMS: "Your order should be arriving—excited?"