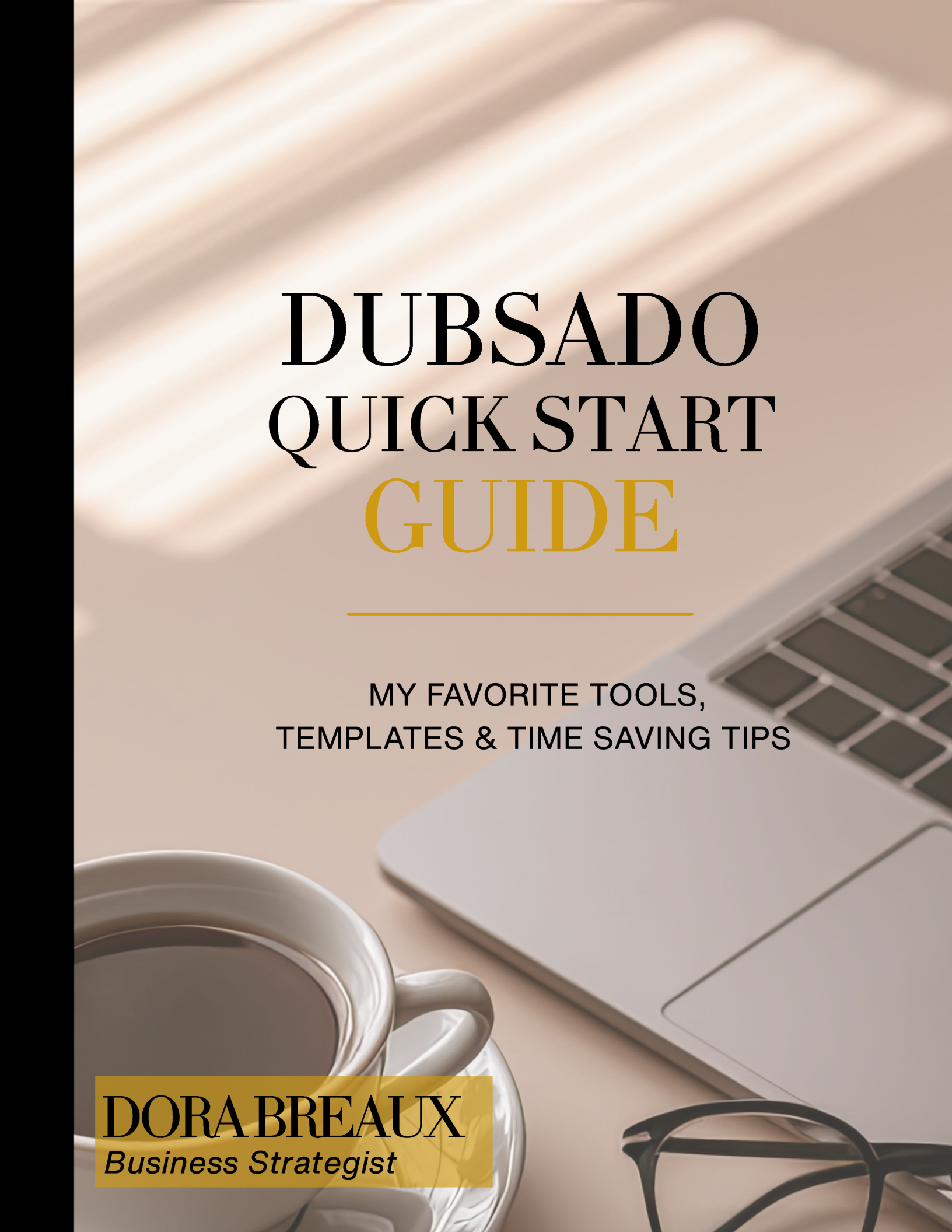




DUBSADO QUICK START GUIDE

MY FAVORITE TOOLS,
TEMPLATES & TIME SAVING TIPS

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Business Strategist



WELCOME

One of the biggest lessons I've learned as a business owner is this:

Your business should work for you—not because of you.

When you're manually responding to every inquiry, sending every invoice individually, or trying to remember every follow-up, your business depends entirely on you being available. That's exhausting.

One of the best investments I've made in my business has been creating systems that automate repetitive tasks while still delivering a professional, personalized client experience.

For me, Dubsado has been a key part of that process. This guide is designed to help you get started with confidence and focus on the features that will make the biggest impact first.

Let's simplify your workflow.

— **Dora**

WHAT IS DUBSADO?

Think of Dubsado as your business operations hub. Instead of juggling multiple apps and spreadsheets, Dubsado helps you manage your client journey from one central location.

You can:

- ✓ Capture new leads
- ✓ Send proposals
- ✓ Create contracts
- ✓ Collect signatures
- ✓ Send invoices
- ✓ Accept payments
- ✓ Schedule appointments
- ✓ Send questionnaires
- ✓ Automate repetitive tasks
- ✓ Create workflows

It's designed to help you spend less time on administrative work and more time serving your clients.



START HERE

Before creating workflows or automations, complete these foundational steps.

Your Setup Checklist

- ☐ Upload your logo
- ☐ Add your brand colors
- ☐ Customize your email signature
- ☐ Connect your payment processor
- ☐ Set your business hours
- ☐ Add your scheduling availability
- ☐ Create your first canned email
- ☐ Add your business policies

 **PRO TIP: START WITH THE ESSENTIALS. YOU DON'T NEED EVERY FEATURE SET UP ON DAY ONE TO BEGIN SEEING RESULTS.**

Build Your Core Client Experience

Every client should experience a consistent and professional journey.

A simple workflow might look like this:

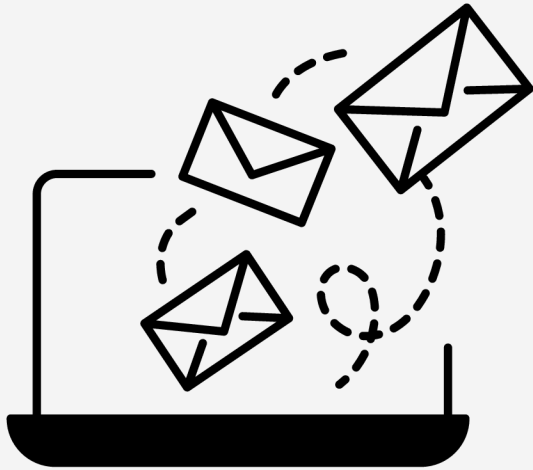


Ask yourself:

If every client followed this process, would they receive the same exceptional experience?

If not, identify where you can create more consistency.

My Favorite Time-Saving Features



CANNED EMAILS

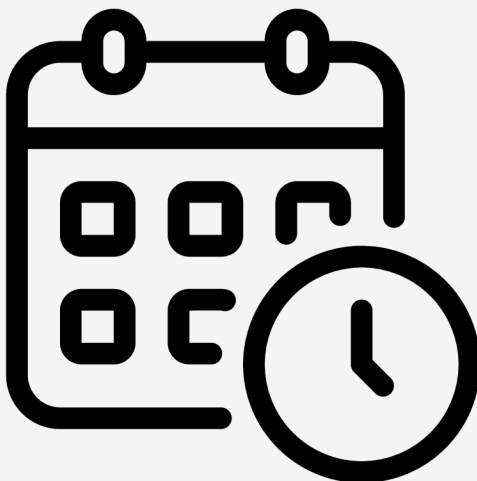
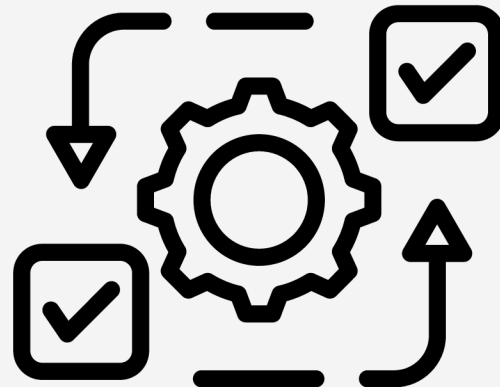
Create reusable email templates for common responses.

Examples:

- Inquiry Response
- Welcome Email
- Project Completion
- Follow-Up

WORKFLOWS

Automatically trigger tasks and emails based on where your client is in the process.

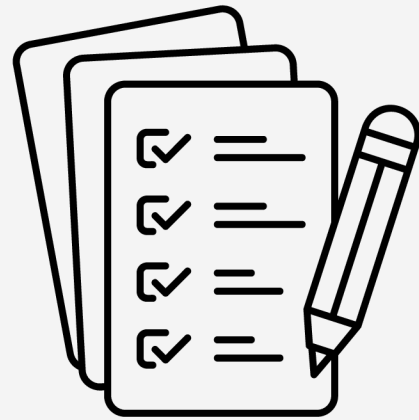


SCHEDULER

Allow clients to book available times without the back-and-forth emails.

QUESTIONNAIRES

Collect the information you need before a project begins.



INVOICES & PAYMENT REMINDERS

Automate invoices and gentle reminders to help keep projects moving smoothly.

MY FAVORITE AUTOMATION MINDSET

Automation isn't about removing the personal touch.

It's about removing repetitive work.

Automate the process so you can personalize the relationship.

Before automating anything, ask yourself:

- ✓ Does this task happen repeatedly?
- ✓ Does every client receive the same information?
- ✓ Could automation reduce delays or missed steps?

If the answer is yes, it's likely a good candidate for automation.

COMMON BEGINNER MISTAKES

You don't need a perfect system before you start.

Avoid these common pitfalls:

- ✗ Trying to automate everything at once
- ✗ Building complicated workflows before testing them
- ✗ Skipping the client journey planning stage
- ✗ Forgetting to send yourself test emails
- ✗ Creating too many templates before knowing what you actually use

Start simple and refine as you grow.



YOUR FIRST 30 DAYS



WEEK 1

Complete your account setup and branding.

WEEK 2

Create one client workflow from inquiry to onboarding.

WEEK 3

Test every form, email, scheduler, and automation.

WEEK 4

Begin using your workflow with new clients and make adjustments based on your experience.

Remember: Progress is better than perfection.



READY TO SIMPLIFY YOUR BUSINESS?

If you're ready to create a more organized and consistent client experience, I'd love to help you take the next step.

Through my Dubsado referral link, you can:

- ✓ Explore Dubsado and see if it's the right fit for your business.
- ✓ Receive 20% off your first month or year.

Don't Forget!

As a thank-you for attending today's session, you're also eligible to enter the giveaway for **a FREE 1-Year Dubsado Premier Plan (a \$525 value).**

Scan the QR code to:

- Enter the giveaway
- Access my Dubsado resources
- Download the CEO Clarity Collection
- Connect with me



REMEMBER.....

The goal isn't to build the most complicated workflow.

The goal is to create a business that's easier to run, more enjoyable to lead, and better equipped to serve your clients.

Every system you build today creates more freedom for tomorrow.

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