

Automation · Service guide

Client Onboarding Flow

A smooth, professional start for new clients.

When a client says yes, they receive your intake form, agreement for e-signature and welcome messages, and your team gets a checklist of what to do next.

Message only

How it works	Email and e-signature
Best for	Real Estate Teams
You stay in control	You approve every document and message
First step	A short call with no obligation

How this helps

What it means for your business

Every new client means the same forms, emails and reminders, done by hand.

Customers get a clear message at the right time, and follow-up no longer depends on someone remembering. You decide what is sent, when it is sent and when it stops.

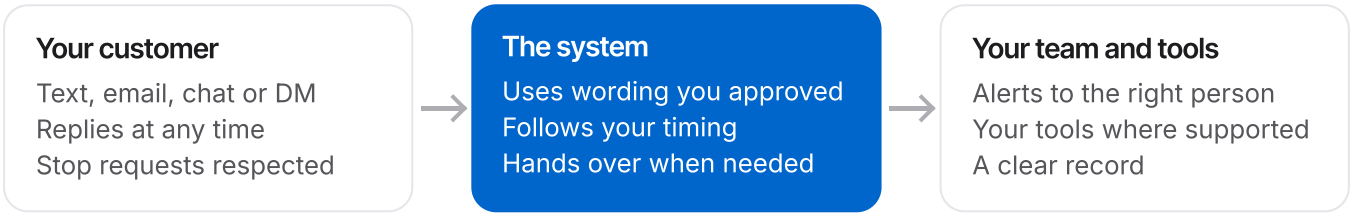
What you get

- Clients feel looked after from day one
- Reminders for unsigned forms
- Your team knows exactly what to do
- Less back-and-forth by email

What changes day to day

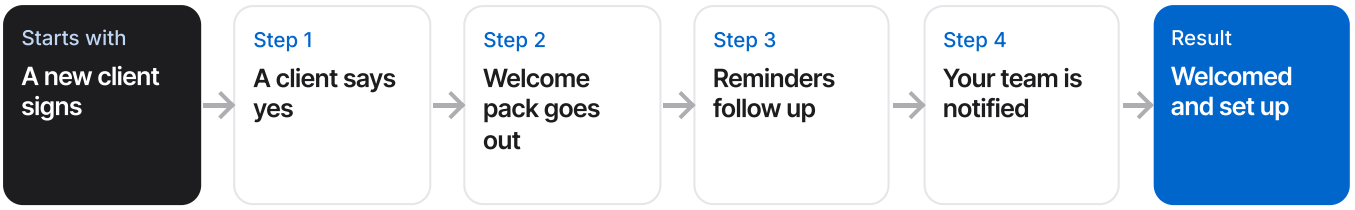
	Common today	With this service
Follow-up	Depends on who remembers	Runs on the rules you set
Wording	Written from scratch each time	Uses wording you approved
Timing	When someone gets a moment	Within the hours you choose
Replies	Scattered across inboxes	Passed to the right person
Visibility	Hard to see what was sent	A clear record of what went out

How it fits with your business



How it works

From start to finish



Step 1

A client says yes

You mark the deal as won.

Step 2

Welcome pack goes out

Forms, agreement and next steps.

Step 3

Reminders follow up

For anything not yet completed.

Step 4

Your team is notified

With a checklist for the first week.

Example · Message scene

A new client says yes. Your welcome flow starts automatically.

Email and e-signature

What happens next

Your team gets a task list, and a reminder goes out if anything is unsigned.

Welcome email

To	New client
Subject	Welcome to Harper Homes, here is what happens next
Included	Intake form, agreement to sign, what to expect this week
Your team	Task list created and assigned
Reminder	Sent if anything is unsigned after 2 days

How easy it is

We do the heavy lifting

Most of the work happens on our side. You make the decisions, and we tell you exactly what we need.

What we handle

- Write the messages with you
- Connect your tools where supported
- Set the timing and the rules
- Test everything before it goes live
- Adjust the wording after launch

What you do

- Share your rules and examples
- Approve the messages
- Check the first sends
- Tell us what to change

Service levels

Start simple, go further when you are ready

Level 1

Draft mode

We prepare the messages and you approve them before they go out.

Level 2

Connected

Runs with your tools where supported, on the schedule you set.

Level 3

Advanced

More rules, several workflows working together, and reporting.

The right level is confirmed during discovery, based on your business and the tools you use.

What we need from you

- The wording and tone you want
- Access to the tools it needs to work with
- The customers or contacts it should reach
- Who on your team approves it

How we get started

1. A short call about your business
2. A clear plan and scope
3. Setup and testing with you
4. Go live with your approval

Why Calvyrn

Why businesses choose to work with us

Built for your business
Your rules, your wording and your tools. Not a one-size template.

You approve first
Nothing goes live until you have seen it and said yes.

Start small
Begin with one service or one first version, then add more if it helps.

One team
AI systems, automations, websites and web applications in one place.

Plain language
You always know what is being built, why, and what comes next.

Honest limits
We tell you what a system cannot do and where a person should stay involved.

You stay in control

- You approve every document and message
- You decide the steps and who owns them
- You can pause the flow for any client

Questions you may have

Does it phone anyone?
No. This service works by message and makes no phone calls.

How long does it take to set up?
Most automations are live within one to two weeks of receiving what we need from you.

Do I need to change the tools I use?
Usually not. We work with the tools you already have wherever possible, and confirm this on our first call.

What if I want to stop?
Plans are month to month. You can pause or stop any automation.

Important notes

- Examples in this guide use fictional businesses, names and details.
- Results depend on your business, tools, customers and how the service is set up. We do not guarantee revenue, bookings or search rankings.
- AI can make mistakes. That is why approvals, clear limits and human hand-off are part of the setup.
- Features depend on your plan and on the tools you use. The final scope is confirmed during discovery and in your proposal.
- This guide is not legal, medical, tax or financial advice.

See how it would work for you
Tell us about your business. There is no obligation.

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