

# HONEYBOOK

## SETUP CHECKLIST



**Build remarkable client experiences with HoneyBook**

CHRISTYPRICE.COM

# Let's Get Started

## Thank You!

Thanks for **downloading** the checklist! If you want to try out [HoneyBook](#), you can do that free for 7 days. If you decide to subscribe, you can use affiliate code **christyprice** (lower case) for 35% off your first year. You'll also receive my Discovery Call Questionnaire AND my Website Design & Services Smart Files automatically!

## How to Use This Guide

I'd recommend setting aside a couple of afternoons to work through the initial setup. Every system has a learning curve, so if you start to feel overwhelmed take a breath and take a break, then come back to it later. Be sure to take advantage of the built-in HoneyBook help chat as you have questions. And remember that you don't have to do everything at once... just keep moving forward.

Wishing you the best with your business!

—Christy



# First Steps

- ☐ Send any templates you already have (contracts, questionnaires, pricing) to HoneyBook so they can add them for you
- ☐ Grab your drivers license (you'll need photos of the front and back)
- ☐ Have your **business** info handy so you can get paid (EIN if you are an LLC, Bank routing & account numbers)
- ☐ Have your headshot and a short business description ready for the Directory
- ☐ Have your logo ready to upload

# Company Brand

PROFILE PIC > COMPANY SETTINGS

- ☐ Contact info
- ☐ Brand elements
  - ☐ Logo
  - ☐ Main button color
  - ☐ Default header image
- ☐ Email signature (make sure it matches any others you use so it looks seamless)
- ☐ About your company (optional)
- ☐ More info (add your mailing address)

# Client Portal

PROFILE PIC > COMPANY SETTINGS

- ☐ Set your unique URL link
- ☐ Style your portal login screen with your logo and brand colors

# Integrations

PROFILE PIC > COMPANY SETTINGS

- ☐ Select your email FROM address
- ☐ Connect HoneyBook Chrome Extension for Gmail (recommended)
- ☐ Connect any other integrations you will be using initially

# Team

PROFILE PIC > COMPANY SETTINGS

- ☐ Add team members (optional)

## Extra Notes

# Preferences

PROFILE PIC > COMPANY SETTINGS

- ☐ Edit your Lead Sources so you can track these
- ☐ Want specific detail fields in every project? Set those up here.
- ☐ Set your project types (mine is just Web Design)
- ☐ Set Notifications (I like setting these to ON as you get started, then you can toggle off later)
- ☐ Set Actions (I expire proposals and invoices 2 weeks after sending them. They only expire if no action has been taken. So if someone accepts a proposal, then it won't expire.)
- ☐ Set up payment reminders (you can customize these if you want but I use the defaults for now)
- ☐ Default File Name Format (I recommend just starting with the suggested names)

# Bank Details

PROFILE PIC > COMPANY SETTINGS

- ☐ Add your business bank account (Don't have one? Get one. Keep your business money separate.)
- ☐ Add Owner Info (you'll need to upload pics of your DL)

## Extra Notes

# Library

TOOLS > TEMPLATES > LIBRARY

- ☐ Add your own images here and delete the ones you don't want to use (You'll use these when you create Projects, Proposals, and more.)
- ☐ If you have pdfs or other docs you send to clients, you can add those to My Files.

## Create Packages

TOOLS > TEMPLATES > PACKAGES

[view HoneyBook walkthrough](#)

- ☐ Add one package for each service you offer (my Professional Web Design service is one package, Mini Branding is another), or ask HoneyBook to create this from your existing packages
- ☐ I also use packages to house Items, so I created a Package called add-ons where I can group items together and then pull them out separately as well in specific Smart Files (think extra page fees, extra calls, etc)

## Smart Files

TOOLS > TEMPLATES > SMART FILES

[view HoneyBook walkthrough](#)

- ☐ I recommend starting with an existing template. If you used my affiliate link or discount code, you'll see two of my templates ready for you to add your own text, images, and contract:
  - ☐ Christy Price - Template: Initial Questionnaire Flow
  - ☐ Christy Price - Template: Website Proposal 2022

# Smart Files

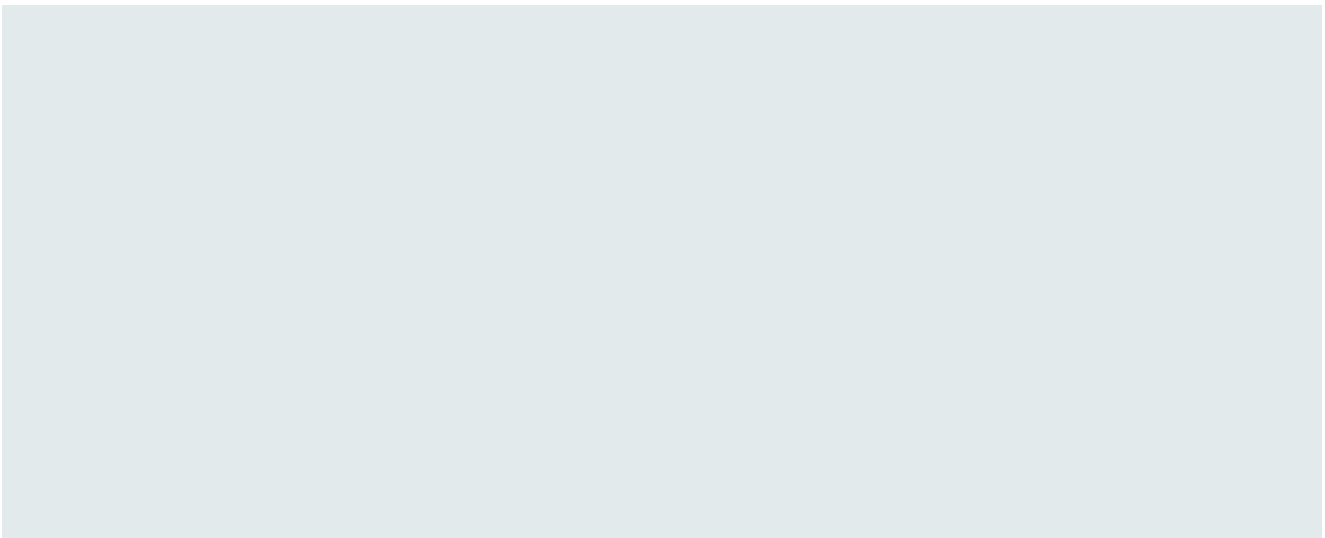
...CONTINUED

- ☐ OR start with one of HoneyBook's templates by visiting their [Template Gallery](#)
- ☐ When sending a smart file through a project workspace, click the Create New button then select the smart file type you'd like to send
- ☐ Make any adjustments for the particular project by adding/removing content or actions and then Share with your client

## QUICK TIPS

- ☐ For best delivery, follow up with a personalized email to your client with a direct link to their Smart File
- ☐ Consider turning OFF [access codes](#) so your client can easily view their Smart File without verification
- ☐ Remember to [add appropriate sales tax](#) to items before sending your Smart File
- ☐ Turn OFF or ON the [gratuity](#) option

## Extra Notes



# Contact Form (optional)

TOOLS > TEMPLATES > CONTACT FORMS

[view HoneyBook walkthrough](#)

- ☐ Embed on your website or send via a link to kick off an automated workflow. This adds each respondent to your HoneyBook (I've chosen not to do this for now to keep HoneyBook tidy as I'm figuring it out.)

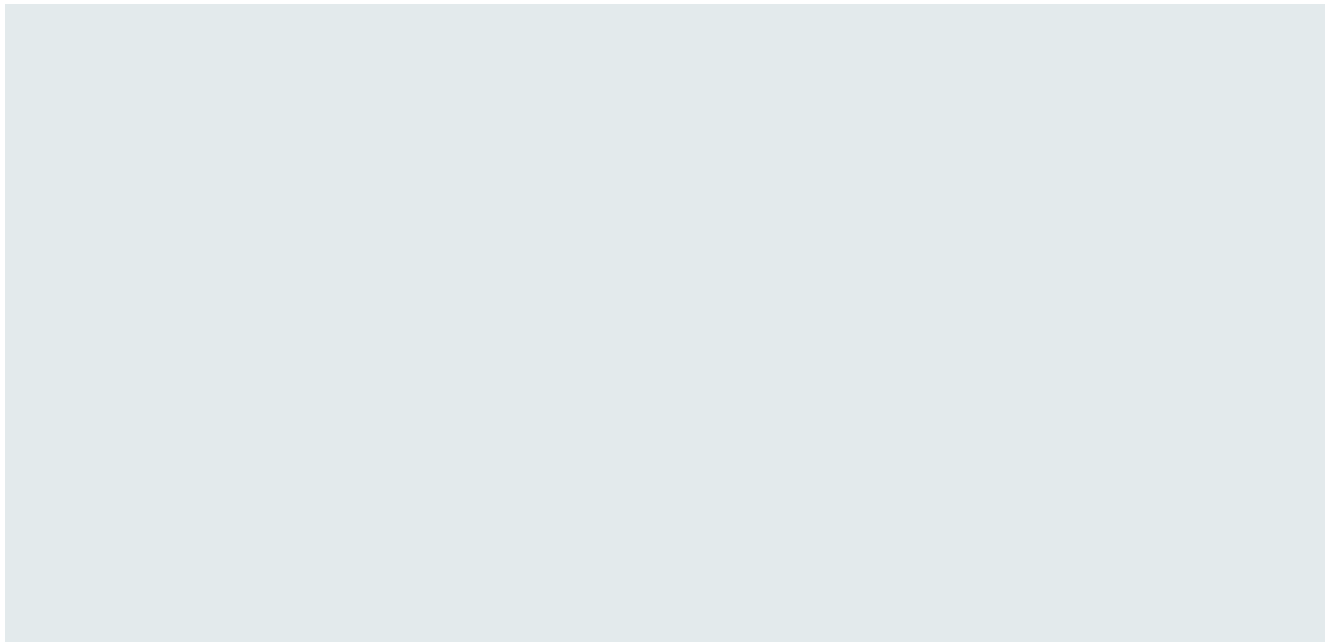
# Emails (recommended)

TOOLS > TEMPLATES > EMAILS

[view HoneyBook walkthrough](#)

- ☐ Create email templates to save time. (Tip: check your last project and make a list of all the emails you typically send out. Add them as templates in HoneyBook. You can also use these in workflows or automations to save time.)

## Extra Notes





# Automations (recommended)

TOOLS > AUTOMATIONS

[view HoneyBook walkthrough](#)

- ☐ Automate tasks and emails for your projects (Tip: as you are getting started, you may want to set each email to require approval before sending so you can double check what's going out. After a project or two, you can remove the approval for emails that don't need customization.)

\*I'm still working on my workflow, but right now it looks like this:

- ☐ After first payment, send questionnaire
- ☐ After questionnaire is submitted, send email to set up a strategy call
- ☐ 1 week before the website build, send a reminder that content and images need to be completed
- ☐ 4 days before the website build, send an email to schedule remaining calls
- ☐ Task: on launch day send final invoice
- ☐ 1 week after launch, send support reminder
- ☐ Task: send client gift
  
- ☐ Task: when final invoice paid, transfer site ownership

# Scheduling (optional)

TOOLS > SCHEDULING

[view HoneyBook walkthrough](#)

- ☐ Connect your Google Calendar (other calendars aren't currently supported)
- ☐ Set your availability and let clients select a time that works for them. (Note: I'm still using Acuity for my scheduling because I don't use Google Calendar, so I haven't fully explored this yet.)

# Odds & Ends

- ☐ If you don't have vendors, contact support to ask them to remove "ask Your Name for her vendor recommendations" on the client side
- ☐ Consider using your domain for the Client Portal ([view HoneyBook walkthrough](#))
- ☐ Use the built-in messaging feature in HoneyBook for help. I've had great experiences getting quick responses when I get stuck or have questions.
- ☐ Add yourself to the Business Directory under Tools > See More and connect to other creatives.

## All Done?

### SHOW YOUR WORK

Remember you can use coupon code **christyprice** (lower case) to save 35% off your first year.

Let's celebrate! Tag me in an instagram post when you finish your setup and I'll share it on my stories: [@christypricewebdesign](#)

