

{FTWS}

# Client Onboarding Playbook

Step-by-step process for onboarding new AutoPilot clients.  
Based on the Soul'd Out Foods deployment, refined for  
repeatability.

## Free The World Software

Internal Operations — March 2026

Timeline: 2-4 weeks per client

## Overview

Each client goes through 6 phases. **Digital Starter** = Phases 0-4 (2 weeks). **Full AutoPilot** = All 6 phases (3-4 weeks).

### PHASE 0 — PRE-SALE (DAY 0)

#### Discovery Call (15-30 min)

- Understand their business: what they do, where, how long

- Identify pain points: what takes too much time, what's broken
- Current digital presence: website, social, email?
- Budget alignment: \$499 Starter vs \$999+\$97 AutoPilot
- Decision maker confirmation: who approves and pays?

### **Close**

- Send proposal PDF (customize from template per industry)
- Collect payment via Stripe Payment Link
- Send welcome email with timeline and what we need from them

## **PHASE 1 — DISCOVERY & BRANDING (WEEK 1)**

### **Collect from Client**

- Business name (legal and DBA)
- Logo (PNG/SVG, minimum 500×500)
- Brand colors (or we extract from logo)
- Menu/services list for website content
- Photos (food, storefront, team)
- Contact info: phone, email, address/service area
- Social media accounts (existing)
- Domain preference (check availability on Cloudflare)

### **FTWS Actions**

- Extract brand colors from logo
- Register domain on Cloudflare (~\$12/yr)
- Create Cloudflare Pages project

- Design color palette: primary, secondary, accent, dark bg, warm white

## PHASE 2 — WEBSITE BUILD (WEEK 1-2)

### Website Checklist

- Homepage: hero, about, services/menu, location, contact
- Mobile-first responsive design
- All SVG icons (no emoji)
- Contact form (mailto: initially, Worker upgrade later)
- Favicon from logo (32×32 + 180×180)
- OpenGraph meta tags (title, description, image)
- Footer: business name, phone, email, social links

Design rules: Food businesses get warm palette (reds, golds).  
Service businesses get clean/professional (grays, blues). No stock photos that look fake. Inter or system fonts only.

### Deploy & Review

- Deploy to Cloudflare Pages with custom domain
- Verify SSL active
- Test on mobile
- Client review and approval

## PHASE 3 — EMAIL SETUP (WEEK 2)

## Cloudflare Email Routing (Free)

- Enable email routing on zone
- Verify destination email addresses
- Create routing rules: info@, contact@, personal addresses
- Test each address end-to-end
- Document all addresses for client

Cloudflare email routing is FREE. Clients receive at their existing Gmail/iCloud/Outlook — no new apps. For sending FROM the domain, add Mailchannels later.

## PHASE 4 — SOCIAL MEDIA SETUP (WEEK 2)

- Instagram: profile pic, bio, website link, category
- Facebook Page: cover photo, about, contact info
- TikTok: profile pic, bio, website link
- Consistent branding across all platforms
- 3-5 content templates with hashtags
- All credentials documented and sent to client

## PHASE 5 — AI AGENT SETUP (AUTOPILOT ONLY — WEEK 3)

### Hardware Decision

**Client-hosted:** Client buys Mac Mini (~\$600), we set up remotely.

**FTWS-hosted:** We host on our cluster (included in monthly fee).

### Agent Configuration

- Install Homebrew, Node.js, OpenClaw on target machine
- Configure workspace: SOUL.md, USER.md, IDENTITY.md, MEMORY.md

- Create Telegram bot via BotFather
- Configure gateway with Telegram channel
- LaunchAgent for auto-start on boot
- Disable sleep on host machine
- Pair client's Telegram account

### **Personality & Security**

- Write SOUL.md tailored to their business and industry
- Include local market knowledge
- Set model (Sonnet for most clients)
- FULL isolation — no access to other client data or FTWS internals
- Scoped Cloudflare API token (their domain only)
- Test 5-10 common scenarios with client

## **PHASE 6 — LAUNCH & HANDOFF (WEEK 3-4)**

### **Client Deliverables**

- Website live on custom domain
- Email addresses active and tested
- Social media profiles set up
- AI agent running (AutoPilot only)
- Documentation packet with all access info

### **Internal**

- Add to monitoring system (healthcheck.sh)
- Log to FTWS Command #Deploys
- Update portfolio on freetheworldsoftware.com
- Create case study after 30 days

Activate Stripe recurring billing

## Cost Tracking Per Client

ITEM	STARTER (\$499)	AUTOPILOT (\$999 + \$97/MO)
Domain	~\$12/yr	~\$12/yr
Hosting	\$0 (Cloudflare free)	\$0
Email routing	\$0	\$0
API tokens	\$0	\$30-80/mo
Infrastructure	\$0	~\$5/mo
Total ongoing	~\$1/mo	~\$40-90/mo
Gross margin	99% (one-time)	\$7-57/mo

## Lessons Learned (Soul'd Out Foods)

1. **Get the logo first** — everything flows from it (colors, social, favicon)
2. **No fake testimonials** — "What to Expect" beats fabricated reviews for new businesses
3. **mailto: forms are fine to start** — don't over-engineer until there's traffic
4. **Food businesses are visual** — warm colors, food photos, inviting aesthetic
5. **Agent personality matters** — deep local market knowledge makes the AI actually useful

6. **Ask about co-owners** — always check if there's a partner who needs email/access

7. **Document everything** — client #3 will ask the same questions as client #1

## Post-Launch Support

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### Included (30 days, all packages)

- Bug fixes on website
- Email routing adjustments
- Social media profile tweaks
- Agent personality tuning (AutoPilot)

### Ongoing (AutoPilot monthly subscribers)

- Agent maintenance and updates
- Model upgrades as available
- Monitoring and failover
- Monthly usage report
- Priority support via Telegram

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Client Onboarding Playbook — Internal Operations

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