

# Jacqui Money MWMV

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## SUMMARY KEYWORDS

clients, website, client onboarding, vip, automate, process, onboarding, branding, step, walkthrough, scheduling, regularly, memberships, email service provider, product, videos, teaser, content, duo, cassius

Hi, I'm Jacqui Money, one half of Virtual Duo. My hubby, Warren is the other half. We have been using MemberVault in our business for over two years now. We love it so much that we have become Certified Partners.

When you think about MemberVault, you usually think about memberships and courses right? So today I want to talk to you about how I use MemberVault with my one to one done for you client work. As a preface to this, I want to just say that we work within the day rate business model, and offer web design MemberVault design, tech and automations. In a day, we wanted our clients to have a VIP experience. And this meant that we needed to wow them with a super professional onboarding, through clock completion of the project and beyond. We also knew that we wanted as much of the process automated as possible, because it allows us to be truly present for our clients on our day together.

This is where MemberVault plays a huge role in our client onboarding and management. Firstly, we looked at our process then pulled out all the pieces that we needed the client's input on. For example, in a MemberVault Design Day, we needed branding, copy for the web, welcome area, the actual course, or content for the product, content and links for the footer area, the emails, the email service provider, the email content and so on. Using Loom we did a complete walkthrough of our own MemberVault showing the clients every section and where each piece of the puzzle would go. We then created a mini course using the walkthrough videos and accompanying Google Doc for clients to fill in the information, such as the welcome message, the course content, the email sequences, etc.

We did the same thing with our branding website, Dubsado, and Honeybook pre work. We use Acuity Scheduling for scheduling our VIP experience as well as taking payment. We embedded the scheduler inside of a teaser module inside of our VIP experience product. This way, if potential clients already in MemberVault, they can view the teaser module and book and pay for the day with us. Once they've paid, it unlocks the product inside of MemberVault and they get access to the pre work. We have the schedule embedded on our work with us page on our website as well, so that clients can book from there if they are on our website. And then they get automatically added to MemberVault as well. We use MemberVault for the 30 days of support that our VIP clients get when they work with us. Every client gets access to their very own support vault with a personalised walkthrough and how to videos to empower them to take charge of their MemberVault, website or take moving forward.

So basically, if you want to use MemberVault for your one to one offer, we encourage you to think of ways that you can automate the onboarding and things that you keep on doing over and over every time. So these are the steps we should suggest you take. Step one, look at your processes and see what you can automate with MemberVault. What information do you regularly regularly need to gather from your clients? What do you find yourself explaining over and over? What information do you regularly give them?

Step two. Decide on other applications and software you're going to use especially for example, email service providers, scheduling, etc. Step three, look at how to integrate everything so that it's a seamless experience for your plants. Step four, test everything. This is what some of our clients have said about the process. Cassius said it was amazing. I was guided step by step through the whole process, so it was easy to follow. I'm very grateful that I found them. Laura, who we did a directory website for her said she had a great experience. Jacqui was so easy to work with and knew just what to ask to really bring my vision to life. It was such a relief to hand off this aspect of my project to someone who was far more knowledgeable than myself.

If you'd like to see how we've set everything up, please pop into our MemberVault. It's [virtualduo.vipmembervault .com](https://virtualduo.vipmembervault.com). Our website is [www.virtual.ca.za](https://www.virtual.ca.za). We also have our portfolio MemberVault portfolios also [virtualduo.co.za/MemberVault](https://virtualduo.co.za/MemberVault)