



You have just invested in an amazing system and you are ready to have someone set it up for you. I specialize in setting up Dubsado and HoneyBook for all kinds of businesses who are ready to work smarter, not harder and I LOVE IT. I cannot wait to increase your capacity to grow your business!

In order to get started, I need LOTS of information from you about your business, so LET'S GO!

## GENERAL QUESTIONS

What gaps do you currently see in your process that you'd like to fill?\*

Fill in the blank: When it comes to systems in my business, if only

What would be the absolute dream to walk away with after we finish our VIP Weekend?\*

Look into the future: in 30 days which of the results below is closest to what you want to accomplish?\*

- ☐ having my processes be automated and off of my todo list
- ☐ having the time to onboard and work with more clients
- ☐ having the time to work on a new product/service to scale my business
- ☐ having more time with myself and/or my family
- ☐ Other

If, other please list the reason below.



## BRANDING & PHOTOS

Your business is distinct and personal. I don't believe in creating one-size-fits-all forms for you. In order to make sure all of the resources in your Dubsado are a fit for your brand, please provide me with all branding information you have and any images (such as logos) that will help me create these personalized forms for you.

### Colors

Fill in any and all colors that apply. If you have more than 3, let me know & I'll add space for additional ones n

Color name and HEX Code:\*

Color name and HEX Code:\*

Color name and HEX Code:\*

Color name and HEX Code:

Color name and HEX Code:

Color name and HEX Code:

Light Grey #EDEDED

## Typefaces & Fonts

Please provide information about your brand fonts you use.

Main Heading Font:\*

Open Sans Bold

Secondary Heading Font

Body text font:\*

I uploaded my font files to my google drive folder?\*

- ☐ No
- ☐ Yes
- ☐ Do not have font files

I understand that if I don't have font files, the closest font in Canva, HoneyBook, or Dubsado will be used instead.\*

- ☐ Yes

Of the fonts shown below, which do you like best for use as your main form font in your CRM system?\*

Helvetica Allura CINZEL Comfortaa Cormorant Garamond  
Fanwood Text Josefin Sans La Belle Aureole Lato Lora  
Montserrat Old Standard TT Open Sans Oswald Pacifico  
Playfair Display Poppins Proxima-Nova  
Quicksand Raleway Roboto Special Elite Roboto Condensed

## Logos + Images

I have uploaded the following item to my google drive folder:\*

- ☐ Full color logo (transparent background)
- ☐ Other frequently used logos (transparent background)
- ☐ Common images associated with your brand
- ☐ A few of your favorite images of you
- ☐ DESIGNERS ONLY- Provide a link to ONE gallery with a 5-10 mockups and examples of your design work. Try to provide a mixture of horizontal and vertical as well as place them inside the devices or situations.
- ☐ PHOTOGRAPHERS ONLY- Provide a link to ONE gallery with a 5-8 of your favorite images from each session type you offer. Try to provide a mixture of horizontal and vertical.
- ☐ NON-PHOTOGRAPHERS- Upload brand images and stock images to be used in prettying up your forms. About 15 photos are recommended.

Add a link to a gallery here. (Optional)

I understand that any stock images Kay + Co. Studio uses are premium images and will require a paid Canva account in order for you to use them or you'll need to purchase the images when you download the files.\*

- ☐ Yes

Do you have notes on the type of stock image we should use for your designs?

(POC, Women only, office life, weddings, etc.)

## CANNED EMAILS

Upload a document with the text for any of your commonly used template emails to your google drive folder. Make sure that each email has enough information for me to know what it's for! Each one should include a title/purpose, a subject, and the email content.

I have uploaded my canned emails inside my goole drive folder?\*

- ☐ I don't have any
- ☐ Yes

Please provide your email signature information. What information do you want to be included in your email signature?\*

## PRICING/PACKAGES

Describe each of your packages, what they include, and their price. Make sure it includes:

### Main Services:

Service Name:\*

Price:\*

Description/Deliverables:\*

Specific Payment Plan:

Service Name:\*

Price:\*

Description/Deliverables:\*

Specific Payment Plan:



Service Name:

Price:

Description/Deliverables:

Specific Payment Plan:

Service Name:

Price:

Description/Deliverables:

Specific Payment Plan:

### Additional Services:

Service Name:

Price:

Description/Deliverables:

Can this be purchased with any main service or only a specific main service:

Service Name:

Price:

Description/Deliverables:

Can this be purchased with any main service or only a specific main service:



No or list the main service it goes with

No or list the main service it goes with

Service Name:

Price:

Description/Deliverables:

Can this be purchased with any main service or only a specific main service:

Service Name:

Price:

Description/Deliverables:

Can this be purchased with any main service or only a specific main service:

OR upload a price list

Choose file(s) to upload

or drag files here to upload

## TAX

Do you include tax in your invoices?\*

☐ No ☐ Yes

What's the sales tax that you charge?

Which services should have this sales tax?

## PAYMENT SCHEDULES

Dubsado and HoneyBook "Payment Schedules" dictate how and when you get paid! For example, a photographer might require a 25% retainer fee to be paid upon contract signing and the remaining balance to be due 14 days before the job end date.

When do you like to get paid for jobs? You may include multiple job types in this box.\*\*

Do you have a specific schedule on which you would like clients to be reminded of their upcoming payments? If not, I default to 2 days before due date, ON the due date, and 2 days past due.

## MEETING TYPES

Appointment Name\*

Appointment Length\*

How far out can this appointment be booked

Appointment Location?\*

Appointment Name\*

Appointment Length\*

How far out can this appointment be booked

Appointment Location?\*

Appointment Name\*

Appointment Length

How far out can this appointment be booked

Appointment Location?\*

Select	Select	Select
Describe your general availability for this appointment.*	Describe your general availability for this appointment.*	Describe your general availability for this appointment.*
Mon, Wed, Thu: 12:30PM - 4:00PM	Mon, Wed, Thu: 12:30PM - 4:00PM	Mon, Wed, Thu: 12:30PM - 4:00PM
How much advance notice do you require before this appointment?*	How much advance notice do you require before this appointment?*	How much advance notice do you require before this appointment?*
24 hours / 7 days	24 hours / 7 days	24 hours / 7 days
Does this appointment cost money to schedule? If yes, how much and what does the cost include?	Does this appointment cost money to schedule? If yes, how much and what does the cost include?	Does this appointment cost money to schedule? If yes, how much and what does the cost include?
No \ Yes, \$250 Onboarding Fee	No \ Yes, \$250 Onboarding Fee	No \ Yes, \$250 Onboarding Fee

Appointment Name	Appointment Name	Appointment Name
Appointment Length	Appointment Length	Appointment Length
How far out can this appointment be booked	How far out can this appointment be booked	How far out can this appointment be booked
30 Days	30 Days	30 Days
Appointment Location?	Appointment Location?	Appointment Location?
Select	Select	Select
Describe your general availability for this appointment.	Describe your general availability for this appointment.	Describe your general availability for this appointment.
Mon, Wed, Thu: 12:30PM - 4:00PM	Mon, Wed, Thu: 12:30PM - 4:00PM	Mon, Wed, Thu: 12:30PM - 4:00PM
How much advance notice do you require before this appointment?	How much advance notice do you require before this appointment?	How much advance notice do you require before this appointment?
24 hours / 7 days	24 hours / 7 days	24 hours / 7 days
Does this appointment cost money to schedule? If yes, how much and what does the cost include?	Does this appointment cost money to schedule? If yes, how much and what does the cost include?	Does this appointment cost money to schedule? If yes, how much and what does the cost include?
No \ Yes, \$250 Onboarding Fee	No \ Yes, \$250 Onboarding Fee	No \ Yes, \$250 Onboarding Fee

Dubsado has a feature where workflow emails will only be sent within office hours. If you do NOT set office hours, your emails will be sent according to how the workflow tells them to, so if a client inquires at 11pm and your auto-response is set to go 15 minutes later, they will receive your response at 11:15pm. Would you like to enable the office hours feature?\*

☐ Yes ☐ No

If you selected yes, please fill in your office hours. Every single day will have the exact same office hours, so please just list one set (for example, 9am-5pm).

## LOGIN INFORMATION

### DUBSADO

In order to set up your Dubsado, I have to be added as a user on your account. Here are directions on how!

TO ADD ME AS A USER:

4. Navigate to the user icon in the top right corner of your

### HONEYBOOK

In order to set up your HoneyBook, I have to have access to your account. There are two ways to give me access:

SEND A LASTPASS INVITE:

4. You'll have to have a lastpass account of your own to do

1. Navigate to the gear icon in the top right corner of your Dubsado window (near your logo); click the gear!
2. Navigate to the "Multi-user" tab in the lefthand menu
3. Click "Invite new users"
4. Enter my email address: support@kayandcostudio.com
5. Set me as an "Admin". This is the only way I can create templates!
6. Voila! I'm in!

Check here when you've added me as a user to your account.

☐ Done!

1. You'll have to have a Lastpass account of your own to do that.
2. Please save your HoneyBook login to your account and share it with me.
3. Use my email address: support@kayandcostudio.com

SHARE YOUR USERNAME AND PASSWORD:

1. Please complete the fields below with your username and password that you use for HoneyBook

Username

Password

### Thank You !

I'm so excited and honored to create this system for your business. Thank you for taking the time to complete all of these questions. I'm looking forward to our Strategy Call and our workday.

**THANK YOU FOR FILLING OUT THIS FORM.**

I will email you if I have any additional questions.

Save Draft

Submit

