THE CLIENT ONBOARDING SYSTEM

A 15-Step Professional Framework for Welcoming New Clients

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WHY ONBOARDING MATTERS (The Business Logic)

From my experience managing real projects, I learned that the first 48 hours with a new client determine 80% of the relationship's success. Poor onboarding leads to:

- Misaligned expectations
- Scope creep
- Delayed payments
- Negative reviews

This 15-step system prevents all of that. It transforms a "transaction" into a "partnership" from day one.

PHASE 1: PRE-PROJECT (Before Work Begins)

STEP 1: CONTRACT SIGNED

- Action: Send the Protection Contract (Module 1) and get it signed.
- Tool: DocuSign, HelloSign, or even a scanned signature.
- Why: No contract = no protection. Never start work without this.

STEP 2: INVOICE SENT (UPFRONT PAYMENT)

- Action: Send invoice for the deposit (typically 50%).
- Tool: PayPal, Stripe, Wise, or your preferred payment processor.
- Why: Cash flow is oxygen. Without upfront payment, you're lending money to a stranger.

STEP 3: PAYMENT CONFIRMED

- Action: Verify payment received before starting any work.
- Red Flag: Client says "I'll pay when you deliver the first draft." → Do not proceed.

STEP 4: WELCOME EMAIL SENT

- Action: Send a professional welcome email that includes:
- Confirmation of project scope and timeline
- Your working hours and response time
- How you'll communicate (email, Slack, etc.)
- What the client needs to provide (assets, access, content)
- Next steps and what to expect in Week 1

Template:

Subject: Welcome to [Project Name] — Here's What Happens Next

Hi [Client Name],

Thank you for choosing to work with me. I'm excited to help you [achieve goal].

PROJECT OVERVIEW:

- ✓ Scope: [Brief description]
- ✓ Timeline: [Start] to [End]
- ✓ Deliverables: [List]

WHAT I NEED FROM YOU:

- ✓ [Asset 1]
- ✓ [Asset 2]
- ✓ [Access/Information 3]

COMMUNICATION:

- ✓ I'll update you every [frequency] via [channel]
- ✓ My working hours are [hours] in [timezone]
- ✓ For urgent matters: [contact method]

NEXT STEP:

I'll begin [specific task] on [date] and share the first update by [date].

Best,

[Your Name]

PHASE 2: PROJECT KICKOFF (Week 1)

STEP 5: DISCOVERY CALL / QUESTIONNAIRE

- Action: Schedule a 30-minute call or send a detailed questionnaire.
- Purpose: Understand the client's real goals, not just what they say they want.
- Key Questions:
  - What does success look like for this project?
  - Who is your target audience?
  - What are your competitors doing well/poorly?
  - What is your budget for ongoing work after this project?
  - What is your biggest fear about this project?

STEP 6: ACCESS & ASSETS COLLECTED

- Action: Gather everything you need to start working.
- Checklist:

□ Brand guidelines (colors, fonts, tone)

□ Logos and image assets

□ Website/CMS access

□ Social media account access (if applicable)

□ Content/copy documents

□ Analytics access (if applicable)

□ Any existing materials to reference

STEP 7: INTERNAL PROJECT SETUP

- Action: Organize your workspace.
- Create a project folder (Google Drive / Dropbox)
- Set up task tracking (Trello / Notion / Asana)

- Block time in your calendar for this project
- Set deadline reminders (3 days before each milestone)

STEP 8: RESEARCH & AUDIT

Action: Before creating, study.

- Analyze client's current state
- Study 3-5 competitors
- Research target audience behavior
- Document findings in a brief (1-2 pages)

PHASE 3: EXECUTION (During the Project)

STEP 9: FIRST DELIVERABLE (The "Quick Win")

Action: Deliver something small but impressive within the first week.

Why: Builds confidence and shows you're proactive.

Examples:

- A mood board before the full design
- An outline before the full article
- A wireframe before the full website

STEP 10: REGULAR UPDATES

Action: Communicate progress consistently.

Frequency: Every 2-3 days for active projects, weekly for longer ones.

Format: Brief email or message with:

- What was completed
- What's next
- Any blockers or questions
- Timeline status (on track / at risk)

STEP 11: FEEDBACK COLLECTION

Action: Present work professionally and ask for structured feedback.

Template:

Hi [Client Name],

I've completed [deliverable]. Here's what I delivered:

- ✓ [Item 1] — [Brief explanation of thinking]
- ✓ [Item 2] — [Brief explanation of thinking]

FEEDBACK REQUEST:

Please review and share your thoughts on:

- ✓ Overall direction: Does this align with your vision?
- ✓ Specific elements: Any changes to [specific area]?
- ✓ Missing anything: Is there something you expected but don't see?

Please consolidate all feedback in one response to keep us on schedule.

Best,

[Your Name]

STEP 12: REVISION ROUND

Action: Process feedback and deliver revisions.

Rule: One round at a time. No scattered requests.

If client sends new requests outside scope: "This is a great idea! I'll add it to the scope expansion quote and send it separately."

PHASE 4: PROJECT COMPLETION (Delivery & Handoff)

STEP 13: FINAL DELIVERY

Action: Deliver final files professionally.

Package includes:

- All final files in requested formats
- A delivery note explaining what's included
- Instructions for use (if applicable)
- Source files (only if included in contract)

Delivery Note Template:

PROJECT DELIVERY: **[Project Name]**

DELIVERABLES INCLUDED:

- [File 1] — [Format] — [Description]
- [File 2] — [Format] — [Description]

USAGE RIGHTS:

You have full ownership rights to use these deliverables for [specified use].

Please retain the original files for future edits.

NEXT STEPS:

- Review all files within 5 business days
- Confirm acceptance or request final adjustments
- Final invoice will be sent upon your approval

Thank you for the opportunity to work together.

STEP 14: FINAL INVOICE & PAYMENT

Action: Send final invoice immediately upon delivery.

Include: "Payment due within 7 days. Late fees apply after 14 days."

Do not hand over final source files until payment is confirmed.

STEP 15: PROJECT CLOSEOUT & RELATIONSHIP BUILDING

Action: End professionally and set up for future work.

- Send satisfaction survey (2-3 questions max)
- Request a testimonial or review
- Add client to your newsletter or update list
- Schedule a follow-up in 30 days: "How are things going?"
- Propose next phase or ongoing retainer

THE ONBOARDING CHECKLIST (Printable)

Print this page and check off each step for every new client:

PRE-PROJECT:

□ Contract signed

□ Invoice sent (upfront)

□ Payment confirmed

□ Welcome email sent

KICKOFF:

□ Discovery call/questionnaire completed

□ All access & assets collected

□ Internal project setup done

□ Research & audit completed

EXECUTION:

□ First quick win delivered

□ Regular updates sent

□ Feedback collected properly

□ Revision round completed

COMPLETION:

□ Final delivery packaged professionally

□ Final invoice sent

□ Project closeout completed

□ Follow-up scheduled

RED FLAGS DURING ONBOARDING (Stop Immediately If You See These)

🚩 Client refuses to sign contract

🚩 Client delays payment beyond agreed terms

🚩 Client adds scope without discussing additional cost

🚩 Client is unresponsive for more than 5 days

🚩 Client disrespects boundaries (calls at midnight, demands instant replies)

🚩 Client says "this should be quick/easy" (undervalues your work)

🚩 Client compares you to cheap alternatives
