A Guide to Easy Client On-boarding

CHECKLIST FOR A SMOOTH COLLABORATION

from

HolaBrief. Kayla

STEP 1

The Brief

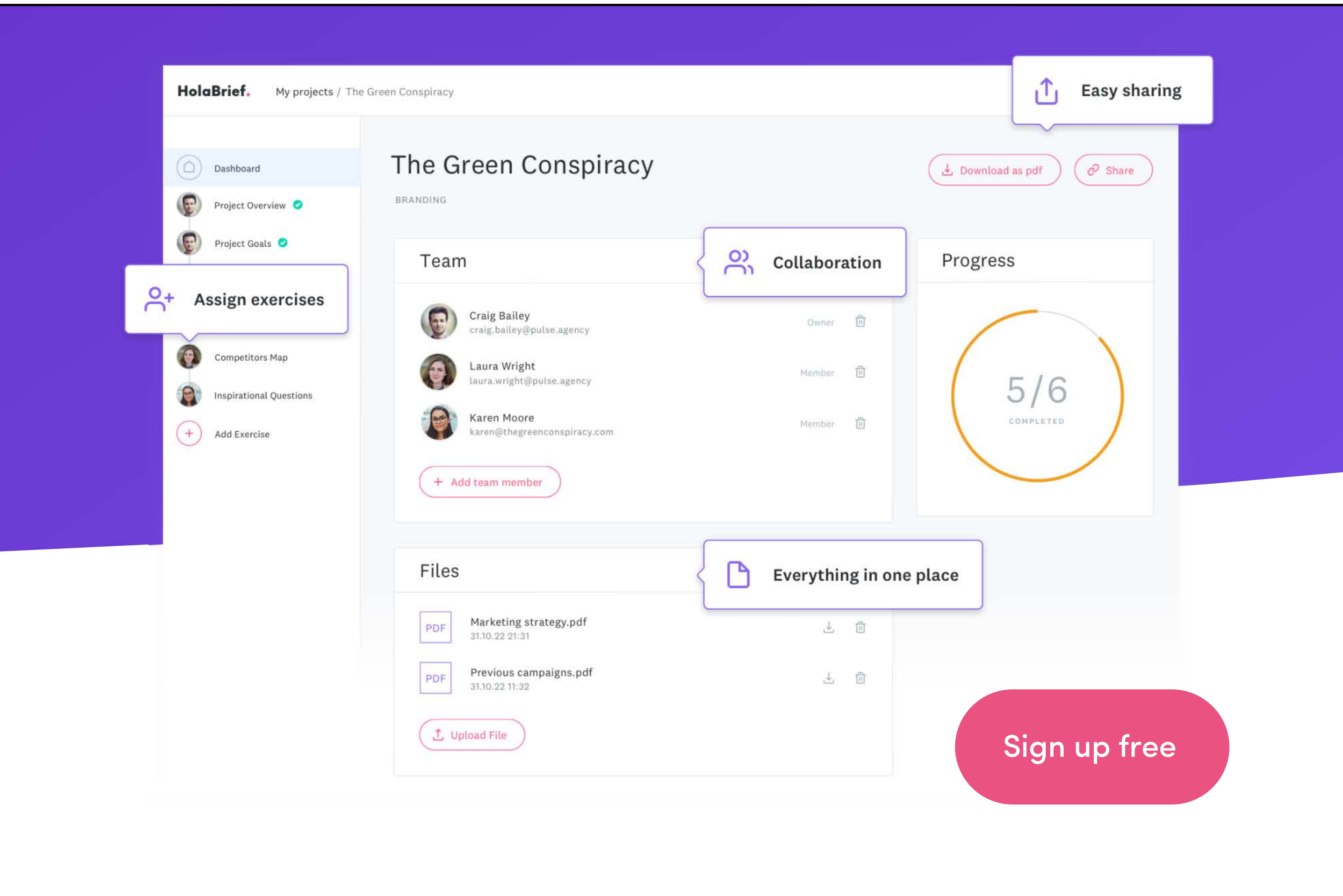
Get to the root of the problem so you can create a meaningful solution

CHECKLIST

Questions to ask:

- ◯ Project goals
- ◯ Current pain points
- ◯ Company strengths
- ◯ Deliverables
- ◯ Deadlines
- ◯ Do’s and don’ts (key info the client wants you to know about)

SOFTWARE TIP – HolaBrief – Get better briefs from clients (click the link to visit the website)



STEP 2

Invoices & Contracts

Send your client the invoice and contract to get the project started

CHECKLIST

Invoices

- ○ Include due date
- ○ Inform your client of payment methods
- ○ Will the payment be all at once or split in to deposits or retainers?
- ○ Use a software to track payments (optional)
- ○ Send a receipt

Contracts

- ○ Offer an easy way to sign the contract
- ○ Send a signed copy to the client

SOFTWARE (click the names to visit the websites)

Accounting and invoicing software

- Xero
- Quickbooks
- Quickfile
- Sage

Send contracts to sign online

- Signable
- Honeybook

INSIDER TIP

What to include in your contract:

Crucial to include:

- The parties involved with contact information
- Compensation - when, how much and at what terms
- Cancellation policy, how much is paid and when can a project be cancelled
- Ownership - this is also a good place to include the right to showcase work in your portfolio

Good to have:

- Do you have any responsibility for processes happening after completion of the project? E.g. of mistakes happening in print or bugs found
- Acknowledgement that all work will be original
- Acknowledgement that confidential company information will not be disclosed

STEP 3

How can they reach you?

Establish an easy way to communicate

CHECKLIST

- ○ Ask your client to assign a contact person
- ○ Introduce your team
- ○ Decide on a communication channel
- ○ Help your client create a login to your channel of choice

SOFTWARE (click the names to visit the websites)

Project Management software/channels

- Basecamp
- Slack
- Stride
- Asana
- Google Suite

INSIDER TIP

Template email script to client:

Dear client,

Welcome to the team! We are really excited to work together and create a brand that can help you reach your ambitious goals. To make it as easy as possible for you to contact us, we will be using Basecamp.

You can find a link to create your Basecamp login here.

This is where we will ask you for feedback at different stages of the design process. We can also use Basecamp to schedule upcoming meetings. By keeping all communications in one place, we make sure everyone is on the same page.

Please let us know if you have any questions and have a great day!

Depending on your clients technology literacy, you might want to add more details for how to use the software.

STEP 4

Timelines, Homework & Deliverables

Time to send the client a plan for the project timeline and what to expect

CHECKLIST

- ◯ Outline key dates & meetings
- ◯ List deliverables for each date, e.g. mood board for the first meeting
- ◯ Request any files you need from the client
- ◯ Client homework list. This can be anything from thinking about inspiration to purchasing a domain name.

INSIDER TIP

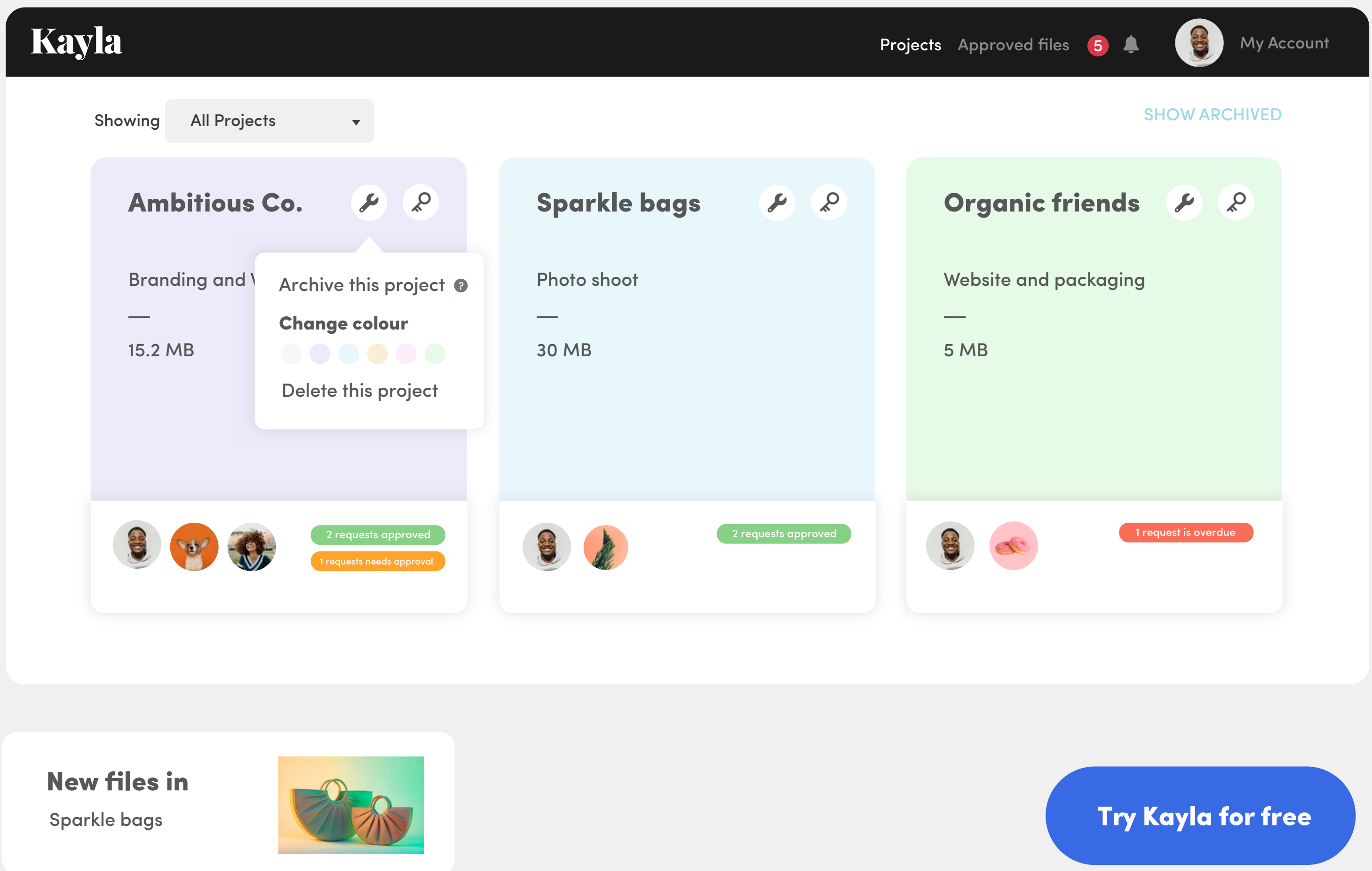
Create a template timeline sheet which outlines key dates, responsibilities and the goals of each meeting. That way, your client can come prepared and it will be easier for you to get the information you need to move the project forward.

You can find a template on the next page. Fill in your own information and send it to your client as soon as they have paid and signed the contract.

We have also added the preferred way of contacting you and the team that you established in the earlier section.

Template on the next page →

SOFTWARE TIP – Kayla – collect content on time (click the link to visit the website)



Let's get started!

your logo

Welcome to the team, we are really excited to work together. This document shows you the milestones we will be reaching throughout the project and what needs to be prepared. This means we have more time to focus on creating a great design.

KEY DATE:	PURPOSE:	GOALS:	PREPARATION:
01 January	Scoping session	Outline the website goals and the user journey	Look over your current website traffic and consider the sales goals.
10 February	Wireframes	Make sure the layout of the website is right before we move forward.	You will be sent a document through Basecamp. Please make sure your account is set up before this.
30 March	Design meeting	Look over the website design and discuss any changes needed.	

This project scope includes 2 rounds of revision.

YOUR TEAM:

John Doe

Project Manager

Sandra Dee

Head Designer

Have a question? Get in touch over Basecamp by clicking here

STEP 5

Feedback

Avoid confusing emails and get clear feedback

CHECKLIST

- ○ Who will provide feedback?
- ○ Introduce any software you would like to use

SOFTWARE (click the names to visit the websites)

Feedback and collaboration software

- Invision
- Cage app
- Red pen
- Wake
- Project Huddle
- Zeplin
- Adobe XD

INSIDER TIP

Pick the right software:

If you are designing for web or apps, you can use the same software to design, test and get feedback. Zeplin and Adobe XD both allow for this.

Get quality feedback:

Always ask your clients to motivate their feedback. It is ok to question the feedback in a constructive way. Avoid falling in to the trap of simply executing anything your client asks for. They have hired you because you have the right expertise, stay humble but ask why.

STEP 6

Adressing questions

Just ask. Check in to make sure your client feels comfortable with your design process and what they have to do. Finish by reminding them of the next meeting.

Happy Designing!