
Profitable Project Plan Detailed Outline

A step-by-step overview of the client management system

While Profitable Project Plan is first and foremost a client management system, the benefits to deeply understanding each and every step of the system are insurmountable.

With a system in place to support you, your business, and your clients, you will be more confident in not only speaking about what you do, how you help people, and why you're the best choice, but in communicating with clients throughout the process as a knowledgeable expert.

The outline of the Profitable Project Plan core systems on the following pages:

- ✓ Cover how the systems work out of the box
- ✓ Provide a valuable tool to refer back to during implementation
- ✓ Offer a baseline to work from as you customize the system for your business.

Remember, with Profitable Project Plan, you can:

- ✓ Remove steps, calls, emails, or content that isn't right for your unique business and process
- ✓ Change or edit any of the content, reorder steps, and adjust things to meet your needs
- ✓ Add new elements specific to your niche or clients that may be missing

Now, let's dive deeper into Profitable Project Plan, step-by-step:

How it works, step-by-step

1. Welcome Your Clients

- **Deposit received**

Profitable Project Plan begins only after you have received the client's signed contract and the first non-refundable payment.

- **Thank you and what's next email**

When payment is made, send an email thanking your client for choosing you. Let them know that you're excited to get started and share what happens next.

- ▶ Send email 1 day after deposit receipt

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- **Send welcome card**

Send a handwritten note by mail. Receiving something nice from you confirms their investment was a great choice and getting mail (other than bills and junk) is fun.

- ▶ Invest in branded note cards to uplevel your professionalism
- ▶ Add an automatic internal reminder to write the note
- ▶ Mail the welcome card 1 day after deposit receipt

- **Schedule project kick-off call**

Schedule a quick 15 minute phone call to deepen the connection with your client and set the tone for the project.

- ▶ 2 days after deposit is received, provide calendar link so prospect can schedule the project kick-off call
- ▶ Follow up by sending call details by email
- ▶ Send an email reminder the day of the call

2. Onboard Your Clients

- **Host project kick-off call**

Get to know the client a little better through small talk. Review what happens next, tell them about the discovery questionnaire, and communicate what you need them to do.

On the project kick-off call, reinforce the idea of working with you for ongoing website support and technical assistance.

- ▶ The call should only be about 15 minutes
- ▶ At the end of the call, trigger the automated client onboarding email sequence

- **Start onboarding email sequence**

Start the onboarding email sequence that will set expectations, outline the process, provide education and resources, and manage the information gathering for you.

- ▶ 1 day after kick off call, send: Set Clear Expectations
- ▶ 1 day after, send: Step-by-Step Process Outline
- ▶ 1 day after, send: Know, Like, Trust, Conversion
- ▶ 1 day after, send: Anatomy Of A Website
- ▶ 1 day after, send: Setting Goals And Priorities

- ▶ 1 day after, send: Discovery Questionnaire
- ▶ 1 day after, send: Bonus Tools And Resources
 - *Recommended Vendors*
 - *Anatomy Of An Opt-In*
 - *Email Marketing Basics*
- ▶ 1 day after, send: Schedule Design Strategy Call

- **Add to your project management system**

Add the new client project to an internal project management system like Basecamp, Trello, or Asana.

- ▶ Consider setting up templates in your project management system to save time
- ▶ Most clients will not be familiar with your chosen project management software. Consider creating a mini tutorial video that walks them through the things they will need to know and understand to use the software and work with you without frustration or unease

- **Share Dropbox folder with content templates**

Create a Dropbox folder for the project. Add initial content templates for basic content needs not dictated by the content strategy. Share the folder with the client, letting them know this is how they will share their final website content and that more templates will be added as you move through the process.

- ▶ Set up content templates using a tool the client already knows and is comfortable with or a tool like [Content Snare](#) to collect the content
- ▶ Make sure the template sections match the design of the page or the exact content needed so when adding the content to the website, you only need to copy and paste
- ▶ Number the content items outlined in the content checklist and use the same numbers in the content checklist. This helps the client keep things straight and if they have questions, they can simply reference the number

- **Schedule design strategy call**

Schedule the design strategy call to dive deeper into the discovery questionnaire responses, map out the website strategy, and make sure that you and your client are on the same page.

- ▶ Ask questions to clarify discovery questionnaire responses
- ▶ Confirm the customer journey and desired actions
- ▶ Review sample websites provided together to understand what it was that persuaded the client to share them with you
- ▶ Establish the website strategy

- **Discovery questionnaire follow up**

If you have not yet received it completed, check in with client about the discovery questionnaire. See if they need help or have any questions. Remind them that you're available to help.

- ▶ Send Discovery Questionnaire Follow Up email
- ▶ If client fails to return the questionnaire 24 hours before the call and you don't have time to prepare adequately, reach out to the client, and reschedule the call

- **Discovery questionnaire received**

Review the questionnaire to make sure nothing is missing and the questions were answered completely.

- ▶ If the questionnaire was completed well, send a quick thank you by email
- ▶ If the questionnaire was rushed and little information of value was provided, either prepare to ask the questions on the discovery call, or ask the client for additional information

3. Guide Your Clients During Design

- **Host design strategy call**

Connect deeper with your client through small talk. Confirm the client received the Dropbox folder link and that they could access the content templates. See if they have any questions then thank them for completing the questionnaire. Review their answers, digging deeper and asking questions. Talk through the design strategy.

On the design strategy call, if you discuss plugins, WordPress, or other technical solutions, remind the client that they all will need ongoing technical support as new updates are released.

- ▶ The call should be about 60 minutes
- ▶ If the client hasn't seen the Dropbox link, send it to them again. If you're hosting the call through a tool like Zoom, quickly share your screen to show the client the Dropbox folder and the templates you have provided
- ▶ At the end of the call, trigger the automated design support email sequence

- **Start design guidance email sequence**

Start the design support email sequence that will keep the client cared for through education and busy with homework while you're working on the site design.

- ▶ 1 day after the call, send: Project Process Reminder
- ▶ 1 day after, send: Design Review And Feedback
- ▶ 1 day after, send: What Design Approval Means
- ▶ 1 day after, send: Website Content Basics
- ▶ 1 day after, send: Using Stock Photography
- ▶ 1 day after, send: We Can Select The Images
- ▶ 1 day after, send: Social Media Reminder
- ▶ 1 day after, send: More Bonus Tools And Resources
 - *Write Great Headlines*
 - *100+ Questions Your Website Needs To Answer*
 - *Get Your Prospects To Say YES! In One Sentence*

- **Design the website site and provide revisions**

Use information provided in the questionnaire and your design strategy call to guide the design. Work with client on revisions, and number each round of revisions provided. Be proactive.

- ▶ If included, create and present wireframes to the client
- ▶ Refine the wireframes to gain site structure approval
- ▶ Create and present the initial design concept(s) via video call, screenshare, or pre-recorded video
- ▶ Collaborate with the client to refine the design to reach a final approved design

- **Receive design approval**

Let the client know how excited you are that you've reached this milestone. Confirm the site will wow their audience and celebrate, but also be sure to remind the client what providing design approval means for the project.

- ▶ Celebrate with the client that they have reached this big milestone
- ▶ Remind the client of the implications of providing design approval for the project
- ▶ Get the official design approval in writing

- **Schedule next steps call**

Now that the client has approved design, they will be antsy to see it come to life. Schedule a quick 15 minute call with the client to deepen the connection and determine timeline.

- ▶ Provide scheduling or calendar link so prospect can schedule their call
- ▶ Follow up by sending call details by email
- ▶ Send an email reminder the day of the call

- **Create content checklist and content templates**

Once design is finalized, create a content checklist for the client that lists each piece of website content that they need to provide. Also create the rest of the content templates that will facilitate the content completion and submission by your client.

- ▶ Include mockups of the final approved website design in the checklist
- ▶ Add instructions for each piece of content you need to the content checklist
- ▶ Provide links/referrals to recommended resources and/or providers to secure items like a privacy policy, terms and conditions, and disclaimers.
- ▶ Create the remainder of the content templates for the client to complete (match the templates to the content checklist). Use a tool the client already knows and is comfortable with or a tool like [Content Snare](#) to collect the content

4. Support Your Clients During Development

- **Provide content checklist and content templates**

Add the content checklist and templates to the Dropbox you shared with the client at the beginning of the project so they are there when you host the next steps call.

- **Host next steps call**

Strengthen the connection with the client. Communicate what will happen next. Set and agree to a date that client will provide final content. Review timeline for remainder of project. Talk to the client about the content checklist and new templates added to the Dropbox shared folder.

- ▶ The call should only be about 15-20 minutes
 - ▶ Explain what comes next — what you will be doing and what the client needs to be doing
 - ▶ Explain the content checklist and the templates provided via Dropbox and confirm the client can access them
 - ▶ Ask the client to open their calendar and together select a final content due date that the client can commit to
 - ▶ At the end of the call, trigger the automated development support email sequence
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- **Start development email sequence**

Start the development email sequence that will keep the client cared for through education and busy through homework while the site is being built. The fifth email of the sequence is all about website security. The email is honest, accurate, and free from hype, but a little overwhelming and scary too. It reinforces how serious website support is and communicates that you provide this service.

- ▶ 1 day after the call, send: Project Process Reminder
 - ▶ 1 day after, send: Site Title, Description, Author Bio
 - ▶ 1 day after, send: Get A Gravatar
 - ▶ 1 day after, send: WordPress Videos
 - ▶ 1 day after, send: Website Security
 - ▶ 1 day after, send: Reviewing The Demo Site
 - ▶ 1 day after, send: What Website Approval Means
 - ▶ 1 day after, send: Preparing For Launch
-

- **Build website**

Build the website. Test in all major browsers, on a variety of devices. Pay special attention to margins, padding, spacing, and type size across all device sizes.

- **Receive final content**

Review provided content immediately.

- ▶ Note anything that is missing, confusing, extra or out of scope, or doesn't work in the approved design
 - ▶ Discuss with client right away
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- **Add content to website**

Once you have confirmed that you have all of the final content, add it to the client's website, formatting all of the text and adding images and graphics as needed.

5. Prepare Your Clients For Website Launch

- **Client review and final website revisions**

Provide demo website URL to the client to click through and review the working site. Provide URLs to hidden pages. Allow for one final round of minor content-only revisions.

- ▶ Send the email Your Final Website Review with demo URL
 - ▶ Give client one opportunity to make minor content changes
 - ▶ Make the small revisions requested by the client
 - ▶ Send the email Time For Website Approval with demo URL
-

- **Receive launch approval**

Communicate how excited you are for launch. Provide affirmation that their hard work is going to pay off.

- ▶ Celebrate with the client that they have reached this big milestone
 - ▶ Remind the client of the implications of providing final site approval and permission to launch the website
 - ▶ Get the official site approval in writing
-

- **Schedule website launch planning call**

Schedule a quick 15 minute call to confirm the site is approved for launch and review the process.

- ▶ Provide calendar link so prospect can schedule their call
- ▶ Follow up by sending call details by email
- ▶ Send an email reminder the day of the call

- **Host website launch planning call**

Schedule the website launch date and the training session, and review the launch process. Get and test their hosting login details. Recommend a provider if they don't have one yet. Remind client of training video requirement.

Find out if the client has made a decision about the technical support needed for the site and how they will be handling it. If a solid plan is not in place, share your package, pricing, and benefits with the client. Offer to provide a written agreement.

- ▶ The call should only be about 15 minutes
- ▶ Schedule the website launch date/time
- ▶ Schedule the training call/screenshare date/time
- ▶ Remind the client that they must watch the WordPress training videos before the live website training session or the training session will be rescheduled

- **Send support agreement**

Follow up within 24 hours and send the client an agreement for ongoing website support if they have indicated interest.

- **Launch website**

Email client to remind them you're taking the site live. Take the new website live. Transfer ownership. Send client login details.

- ▶ Remind the client to stay out of the website on the day of the launch to avoid any problems
- ▶ Check your work in every browser and device available
- ▶ Test all forms to confirm they work correctly
- ▶ Do everything in your power to never launch on a Friday
- ▶ Package up the theme files and related website files to provide to the client for their records.

6. Provide Outbound Client Care

- **Host client training**

Provide hands-on training for your client, walking them through the site and the features you built for them. Answer questions.

If the client has not already returned the signed ongoing support agreement, ask if they have had a chance to review it and if they have any questions. Remind the client of the benefits and prompt them to move forward.

- ▶ The call/screenshare should be about 60 minutes
- ▶ Confirm the client has watched the WordPress training videos
- ▶ If they have watched the videos, continue the training, if they have not, reschedule the training
- ▶ Thank the client again for hiring you. Let them know you enjoyed working with them
- ▶ Deliver the hands-on training included, walking the client through the backend of their website and any custom features you built.
- ▶ Review what being a website owner means and the new responsibilities the client has — and what tasks are included as part of caring for a site
- ▶ Share that you're going to stay in touch with resources to help get the most out of their website and that you'll let them know when their project is added to your portfolio
- ▶ At the end of the call, trigger the automated exit email sequence to provide additional value

- **Send thank you card**

Send a handwritten note by mail thanking the client for investing in your services. Communicate how much you enjoyed working with them and let them know you'd love to stay in touch.

Alter the message based on whether or not the client signed a support agreement.

- ▶ Invest in branded note cards to uplevel your professionalism
- ▶ Mail the thank you card the same day as the client website training session

- **Start outbound client care email sequence**

Start the client exit email sequence that will continue to deliver value and remind them you're available for more work, even though the client agreement has been fulfilled.

Multiple emails in this sequence mention the benefits of ongoing website support and communicate that you're available for additional work or to help if needed. For clients who signed a support agreement, this reinforces they made a good decision. For clients who didn't sign a support agreement, it acts as a gentle nudge to reconsider.

- ▶ 1 day after the training, send: Congratulations
- ▶ 3 days later, send: WordPress And Google
- ▶ 3 days later, send: Assigning User Roles
- ▶ 3 days later, send: Testimonial Request
- ▶ 3 days later, send: Learn About WordPress
- ▶ 3 days later, send: Security Reminder
- ▶ 3 days later, send: Search Engine Optimization
- ▶ 5 days later, send: Marketing Ideas
- ▶ 5 days later, send: Blog Post Optimization Checklist
- ▶ 5 days later, send: WordPress Plugin Best Practices
- ▶ 5 days later, send: How To Use Website Links
- ▶ 5 days later, send: Using Categories And Tags
- ▶ 5 days later, send: Upsell Additional Services
- ▶ 3 months from start of sequence, send: 3 Month Follow Up
- ▶ 6 months from start of sequence, send: 6 Month Follow Up

- **Create project marketing imagery and content**

While the project is fresh in your mind, and before you get busy with new projects, create the marketing imagery and content needed to promote your work.

- ▶ Screenshot the site on desktop, horizontal tablet, vertical tablet, and smartphone views
- ▶ Create imagery to share on social media
- ▶ Create imagery for a project portfolio entry
- ▶ Write a project case study and portfolio content

- **Update portfolio and share project on social media**

Now it's time to share your work with your audience and remind people of how you help others just like them.

- ▶ Add the project to your portfolio with a testimonial from your client
- ▶ Publish a longer, detailed case study for those serious about exploring your services
- ▶ Share the project on social media and brag up your client — it's important to give them some extra love and send some traffic their way
- ▶ Share the project launch and the excitement you have for your client in your email newsletter