

Welcome

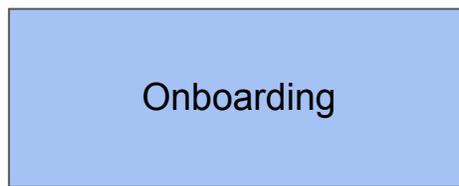
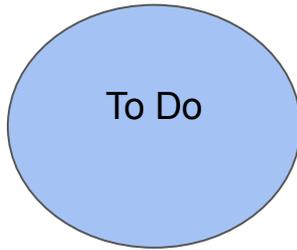
To Do

- ! ● **Receive the signed client agreement / contract from the client.**
- Send the client the first project invoice.
- ! ● **Receive the first payment / non-refundable deposit.**
- Send the “Thank You And What’s Next” email.
- Write and send a welcome card to the client via snail mail.
- ! ● **Invite the client to schedule the project kick-off call/meeting.**
- Add the client to my CRM system.
- Tag the client in the CRM system with all relevant project details (what they bought, plugins you’re going to use, etc.).
- Add client as a phone/email contact to help vet inbound communications.
- Prepare the project’s development account / staging site / local install.

[Full checklist](#)



Denotes action needed or done by the client



- Add the client to the automated onboarding email sequence.
- Add the project to my project management system.
- Create a Request in Content Snare for the project and add the initial content templates.
- **Share the Content Snare Request with the client.**
- **Make sure the client schedules their design strategy call and get it added to my calendar along with reminders to check on the discovery questionnaire is it is not received.**
- **Receive the completed discovery questionnaire from the client.**
- Review discovery questionnaire to make sure client put forth effort.

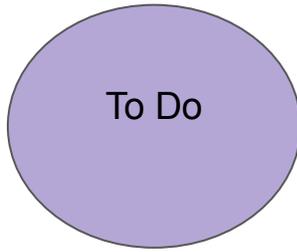


### Full Checklist



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### Call Framework



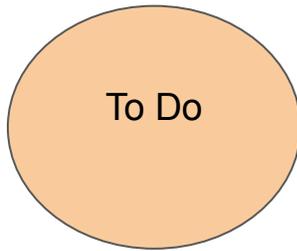
- Print the client's completed discovery questionnaire and copies of the strategic templates to have on hand for the design strategy call.
- Prepare questions for the client and notes about what you need to gain clarification on.
- ! • **Host the design strategy call with the client.**
- Use the strategic templates to take clear notes, map out design ideas, and sketch layout options.
- Immediately after the call, organize your ideas and finish up notes and sketches that are top of mind at the moment.

Full Checklist



Call Framework

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**STEP 1**  
Congratulate Client

**STEP 2**  
Confirm Approval

**STEP 3**  
Explain Development

**STEP 4**  
Discuss Content

**STEP 5**  
Set Content Deadline

**STEP 6**  
Encourage Help

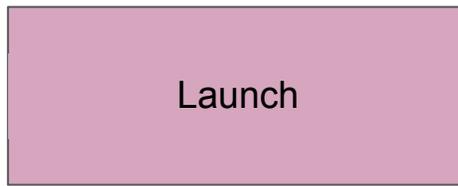
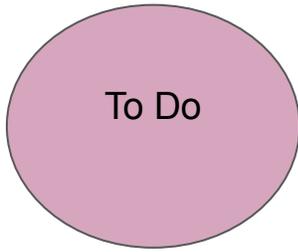
**STEP 7**  
Share Next Steps

- ! ● **Set a final content deadline with the client and add it to the calendar.**
- Add the client to the automated development email sequence.
- Build the website template / WordPress theme.
- Test every detail of the site with demo content in all browsers and on all devices you have access to / support.
- ! ● **Receive the final website content.**
- Review the final website content and **reach out to client if anything is incomplete or missing.**
- ! ● Add content, imagery, and all other media to the website.
- Delete / remove all demo content from the site, including all placeholder images from the media library.

[Full Checklist](#)

[Call Framework](#)

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- ! • **Send the client the demo site to review. Remind the client they have one round of minor revisions available at this time.**
- ! • **Make minor revisions the client has requested. Ask the client to review site one last time and provide final approval to take the site live.**
- ! • **Send the site approval form and receive final website approval.**
- ! • **Schedule the website launch planning call.**
- ! • **Host the website launch planning call.**
- ! • **Schedule the official website launch.**
- ! • **Schedule the post-launch website training session.**
- Send the client a support agreement if they are interested.
- Launch the website and double-check work in all browsers and on all devices available.
- ! • **Notify the client that the website is live and ready to be shown off.**

[Full Checklist](#)



[Call Framework](#)

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