Paige.

The PlayBook

MEMBERSHIP

BUSINESS | MODULE TWO

On boarding & Off boarding Clients

WHY SYSTEMS MATTER

THE ONBOARDING JOURNEY

DISCOVERY CALL & PROPOSAL

CONTRACTS & INVOICES

WELCOME PACK / PORTALS

STRATEGY / DESIGN CALLS

THE OFF BOARDING JOURNEY

IN A NUTSHELL

Why Systems Matter

IT MAY SAVE YOU CRYING AT NIGHT...

IF YOU WANT TO BE TAKEN SERIOUSLY, YOU NEED TO START TAKING YOUR BUSINESS SERIOUSLY.

Creates consistency and ease

Saves time, reduces stress, and builds trust

Turns your process into a premium experience

Helps clients feel supported and confident

THE ONBOARDING JOURNEY

1. *Client Interaction*
2. *Discovery call*
3. *Proposal*
4. *Contract & invoice*
5. *Welcome pack*
6. *Strategy call*
7. *Strategy build & Sign off*
8. *Project begins*

Client Interaction

FIRST IMPRESSIONS...MAKE IT COUNT

SO YOU GOT A LEAD...

The moment a potential client first interacts with your brand, often your website or social media.

THEY FOUND YOU

Is it through social media?

Is it though ads?

Is it by Google Search and then going onto your website?

HOW DO THEY SUBMIT AN ENQUIRY?

Book a call right away. ✗

Fill out a form and you get in touch with them. ✓

Next steps:
Share a clear "Work With Me" or "Investment Guide" page

A seamless enquiry form or Call scheduler (like Acuity or Calendly)

Tips:
Keep the form short but intentional (name, email, business type, what they need)

Do they know your prices before jumping on a call with you?

Discovery Call

THIS ISN'T AN INTERVIEW FYI...

YOU TAKE THE LEAD.

Outlining Discovery calls...

START

Introduce yourself.

Let them introduce themselves and an overview of their business.

MIDDLE

Get clear on their goals, timeline, and budget.

Listen to their pain points.

END

Explain your process + next steps.

Allow time for them to ask any questions they may have.

CALL HAS ENDED...

It's time to sell yourself with a great Proposal

Send within 48 hours

Include package options and clear deliverables

Mention start dates /availability

Emphasise value, not just features

End on success stories

Proposal Template is in the Template vault!

Contracts & Invoices

BORING BUT CRUCIAL...

SOCIAL MEDIA MANAGERS

This is what you need to keep you protected

CONTRACT

- *Your name, business name, address, and email*
- *Client name, business name, address, and email.*
- *Service dates*
- *Scope of services (number of posts, platforms managed, engagement duties)*
- *Payment structure and schedule (e.g. monthly retainer, due dates)*
- *Revisions and feedback policy*
- *Approval process (e.g. auto-approval if no response within 48 hrs)*
- *Late payment clause (e.g. work paused after X days)*
- *Late communication or unresponsiveness clause*
- *Platform access & responsibility (clarify what client must provide)*
- *What's excluded (e.g. ad budget, paid tools)*
- *Termination clause (e.g. 14-day notice)*
- *Confidentiality & NDA (what stays private)*
- *Privacy policy & GDPR compliance (especially if handling client/customer data)*
- *Jurisdiction (which country/state laws apply - where you are based)*

INVOICE

- *Your name, business name, address, email, Tax ID / VAT number*
- *Client name, business name, address, and email*
- *Unique invoice number*
- *Date of issue*
- *Due date*
- *Payment terms (e.g. 7 days, 14 days)*
- *Breakdown of services (what they're paying for)*
- *Total amount due + currency*
- *Add ons (if applicable)*
- *Payment methods or link*

BRAND DESIGNERS

A lil' different... This is what you need to keep you protected

CONTRACT

- *Your name, business name, address, and email*
- *Client name, business name, address, and email.*
- *Deliverables (e.g. logo, guidelines, website)*
- *Timeline & key dates*
- *Rounds of revisions included*
- *Final files & handover terms*
- *Ownership & usage rights (transfer upon final payment)*
- *Client delay clause (what happens if they go MIA)*
- *Scope creep protection (add-on fees for extras)*
- *Communication expectations*
- *Late payment & restart clauses*
- *Termination rights (e.g. for project abandonment or misconduct)*
- *Intellectual property clause (what you own until paid for)*
- *Confidentiality agreement (for assets, strategies, client data)*
- *Jurisdiction & governing law (important for international clients)*
- *Privacy policy & GDPR compliance*

INVOICE

- *Your name, business name, address, email, Tax ID / VAT number*
- *Client name, business name, address, and email*
- *Unique invoice number*
- *Date of issue*
- *Phase breakdown (e.g. 50/50 payment)*
- *What's included in this phase*
- *Payment terms & due date*
- *Payment method*

TOOLS TO HELP CRAFT & SIGN CONTRACTS

Or head to the Template Vault - You’re welcome!

TO CRAFT CONTRACTS

bonsai

HONEYBOOK

The CONTRACT .SHOP

dubsado

TO SIGN CONTRACTS

Dropbox Sign

PandaDoc

docusign

Always get contracts signed before starting anything

Welcome Pack/Portal

KEEP IT SIMPLE BUT INFORMATIVE

WELCOME PACK - SMMS

Let's set your client up...

Timeline, deliverables, key dates

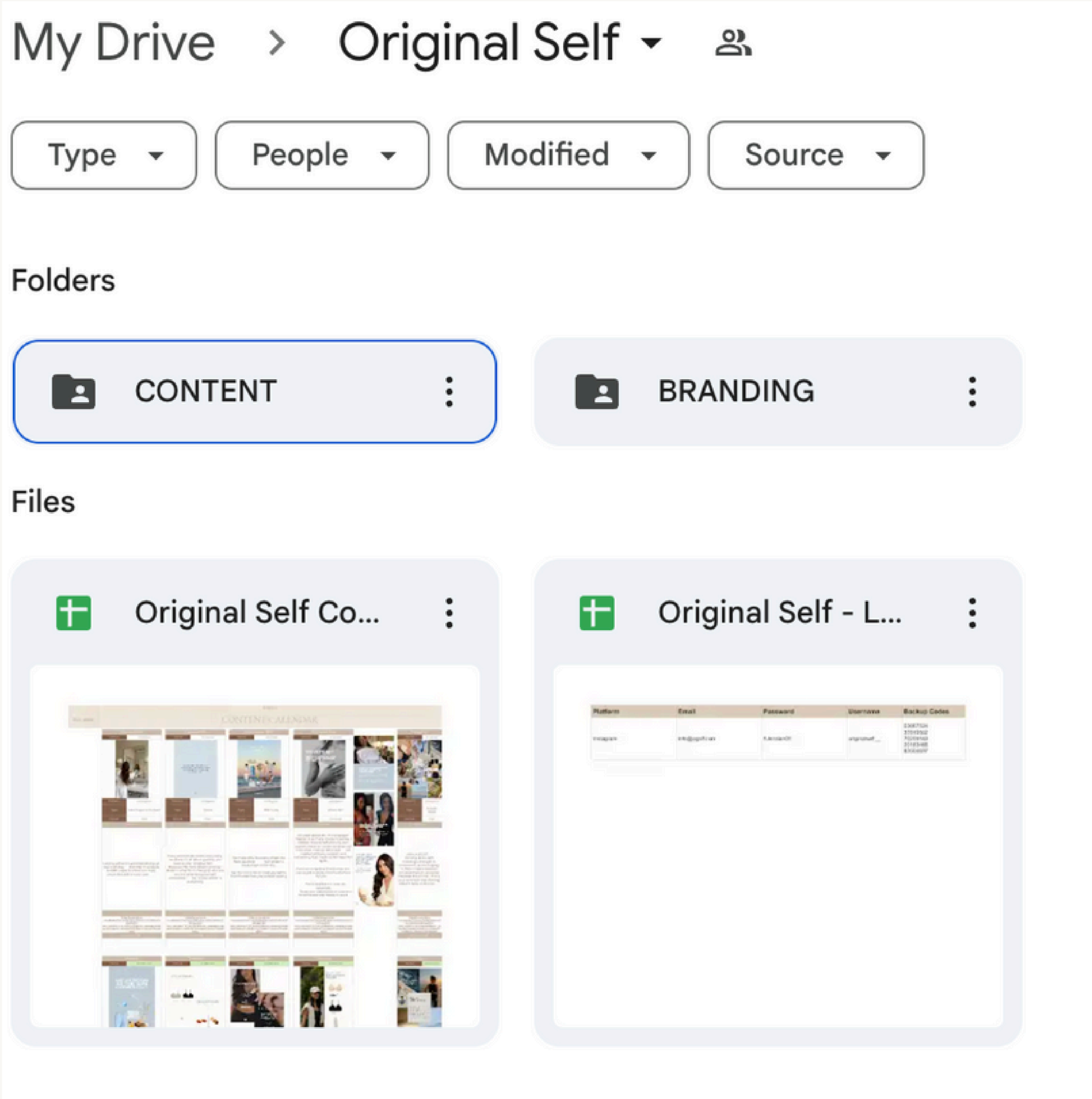
Communication guidelines (WhatsApp, Email, Slack)

What you need from them

Access links (Google Drive, Login forms, etc.)

Tools that collect logins:

- Nord Pass
- Lastpass
- 1Password

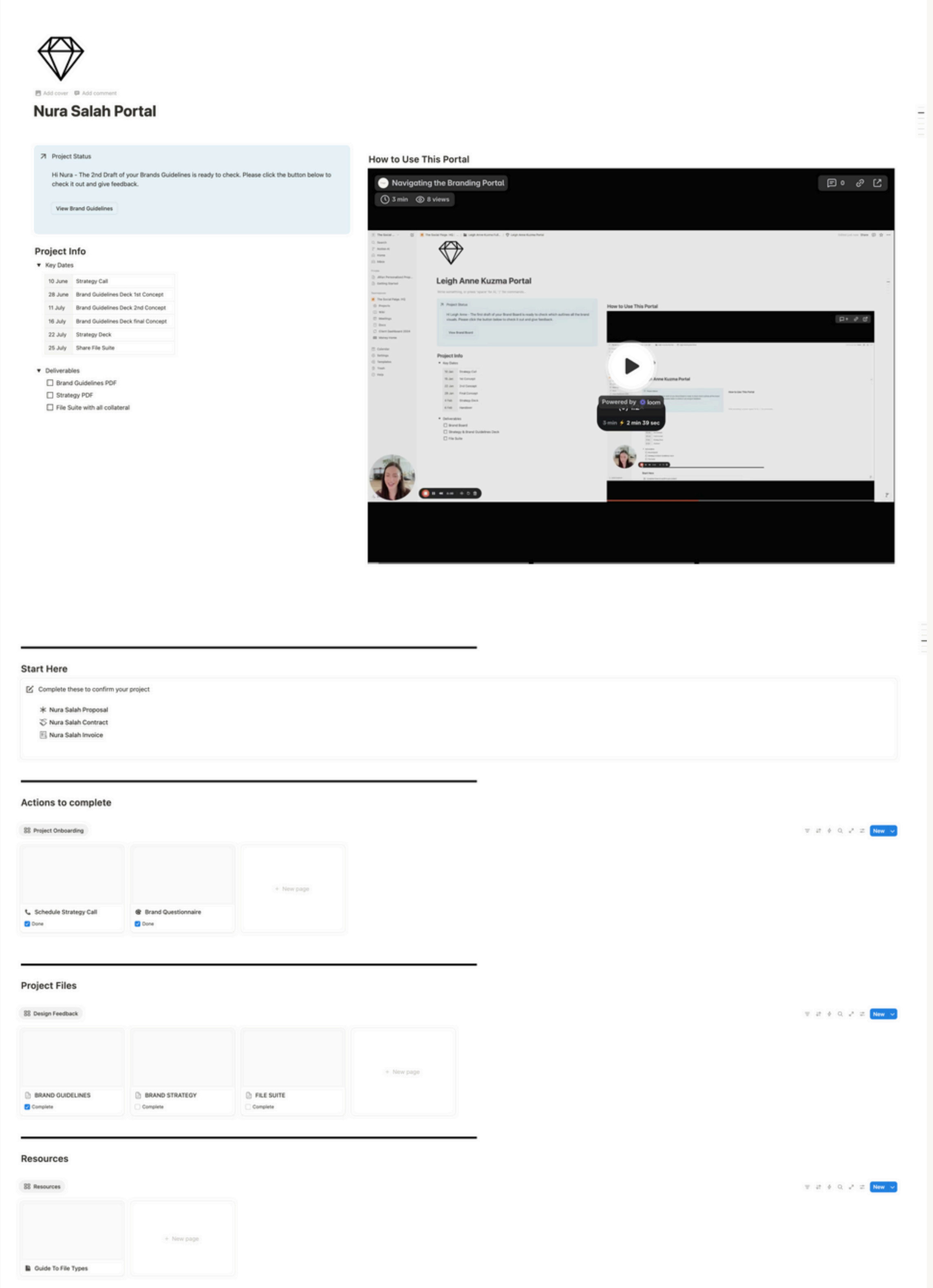


Don't forget to download the Welcome Pack Template in the Template Vault

PORTAL - DESIGNERS

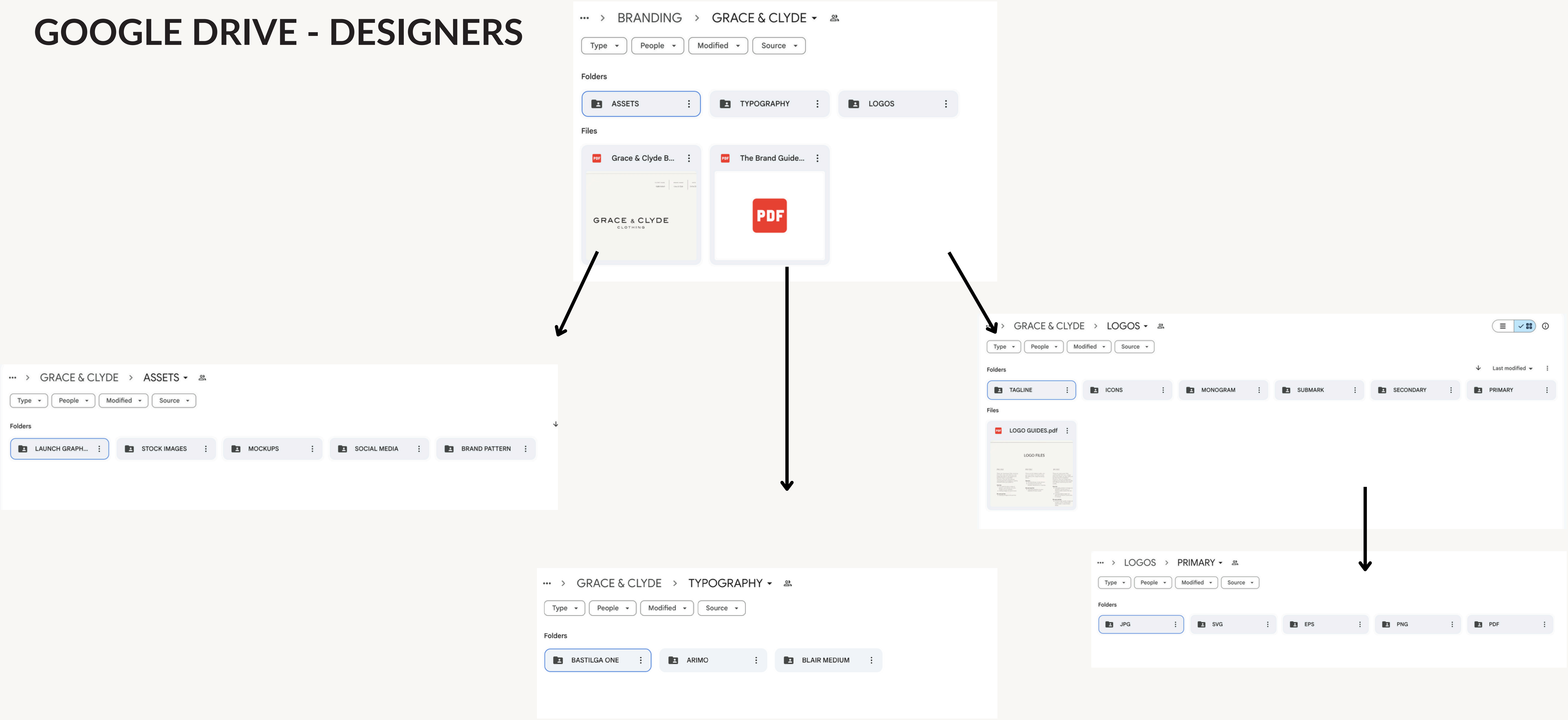
Let's set your client up, and give them access to their portal. This is where feedback will happen.

Set up a Google Drive (This is where the brand files will be saved)
Brand Questionnaire (on Notion portal)
Documents - Invoices, contracts, & proposal (on Notion portal)
Deliverables & Dates



Don't forget to download the Notion Designer Portal Template in the Template Vault

GOOGLE DRIVE - DESIGNERS



Strategy / Design Call

LET'S DIG A LITTLE DEEPER

PURPOSE OF THE STRATEGY CALL:

Build rapport and trust

Get clarity on goals, expectations, and direction

Position yourself as the expert

Set boundaries and timelines

Reduce back-and-forth later

You're asking all the questions.

FOR MY FELLOW SMMS

Purpose:

Get clear on goals, gather what you need, and align on a social media direction that works.

Goals & KPIs

- What do you want to achieve with social media? (e.g. sales, visibility, community)
- Are there specific metrics you're tracking right now?

Content Direction

- What's your current tone of voice?
- Are there any content formats you love or want to avoid?
- Any themes or campaigns coming up?

Audience Insights

- Who are you targeting?
- What kind of content do they engage with now?
- What problems are you solving for them?

Content Logistics

- Will I be sourcing content or working with your internal team?
- Where will content be approved/scheduled?
- Do you need help with captions, strategy, or both?

Access & Tools

- Instagram logins / Meta access / Scheduling tools?
- Where do I upload deliverables?
- Preferred method of communication?

Timelines & Reviews

- Are there launch dates or busy periods to note?
- How quickly can you review content?

Top Tip: Your strategy template helps you understand what questions to ask

FOR MY FELLOW DESIGNERS

Purpose:

Understand the brand, visual direction, and key business goals before diving into design.

Brand Strategy

- What's your brand's mission, vision, and purpose?
- What do you want your brand to be known for?
- Who is your audience and what do they care about?

Visual Preferences

- Are there any brands or aesthetics you love (or dislike)?
- What colours, styles, or design elements feel aligned?
- Do you have any existing brand assets (logo, moodboard, fonts)?

Project Goals

- What's the goal of this design project? (e.g. launch, rebrand, growth)
- What would a successful outcome look like to you?

Assets & Workflow

- Do they have content or copy ready? (brand shoot)
- Where should files be shared?
- What format do you need deliverables in?

Timeline

- Any key deadlines?
- What's your review/feedback turnaround time?

Top Tip: Your Notion Portal template has a brand questionnaire inside

Offboarding

THIS DOESN'T NEED TO TAKE YOU HOURS FYI.

KEEP IT SHORT & SWEET

Your offboarding should feel just as smooth and intentional as onboarding. It's the final touchpoint, and the start of potential future collaborations or referrals.

Final Deliverables:

- Send all files in clearly labelled folders (e.g. Google Drive, Notion, Dropbox)
- For designers: brand guidelines, logo files, font licenses, Canva templates, etc.
- For SMMs: final content calendar, analytics report, passwords if you managed their logins

Feedback or Handoff Notes:

- Wrap-up email summarising the project
- Handoff instructions if needed.
- How to continue using what you've created together.

Testimonial Request:

- Make it easy: send a quick form or a few prompts
- Offer to guide them with examples of what to share

CONTINUED....

Offboarding Reminders:

- Include clear info on when access ends (e.g. Slack, Google Drive, shared tools)
- For SMMs: note when you'll revoke access to schedulers, passwords, shared folders.

Keep in Touch:

- Offer future support (like retainer options, quarterly check-ins, communication duration after contract ends, etc.)
- Invite them to stay connected — e.g. newsletter, or referral program.

Optional Extras:

- Send a goodbye gift (template, discount code, client thank-you PDF)
- Share a referral incentive for bringing in future clients
- Send a full report of the successes you achieved during your time together (SMMS)

In a Nutshelll

IT'S NOT THAT COMPLICATED I PROMISE

UNSUCCESSFUL CLIENT ONBOARDING

Fills out application form

Discovery call

Send proposal within 48 hours.

No answer? Chase within 1 week.

No answer? Chase again within 4 days.

No answer? I personally move on.

You can always keep this client's details on file and reach out again in a month or 2.

But this is the end of the line for an unsuccessful client onboarding.

SUCCESSFUL CLIENT ONBOARDING

Fills out application form

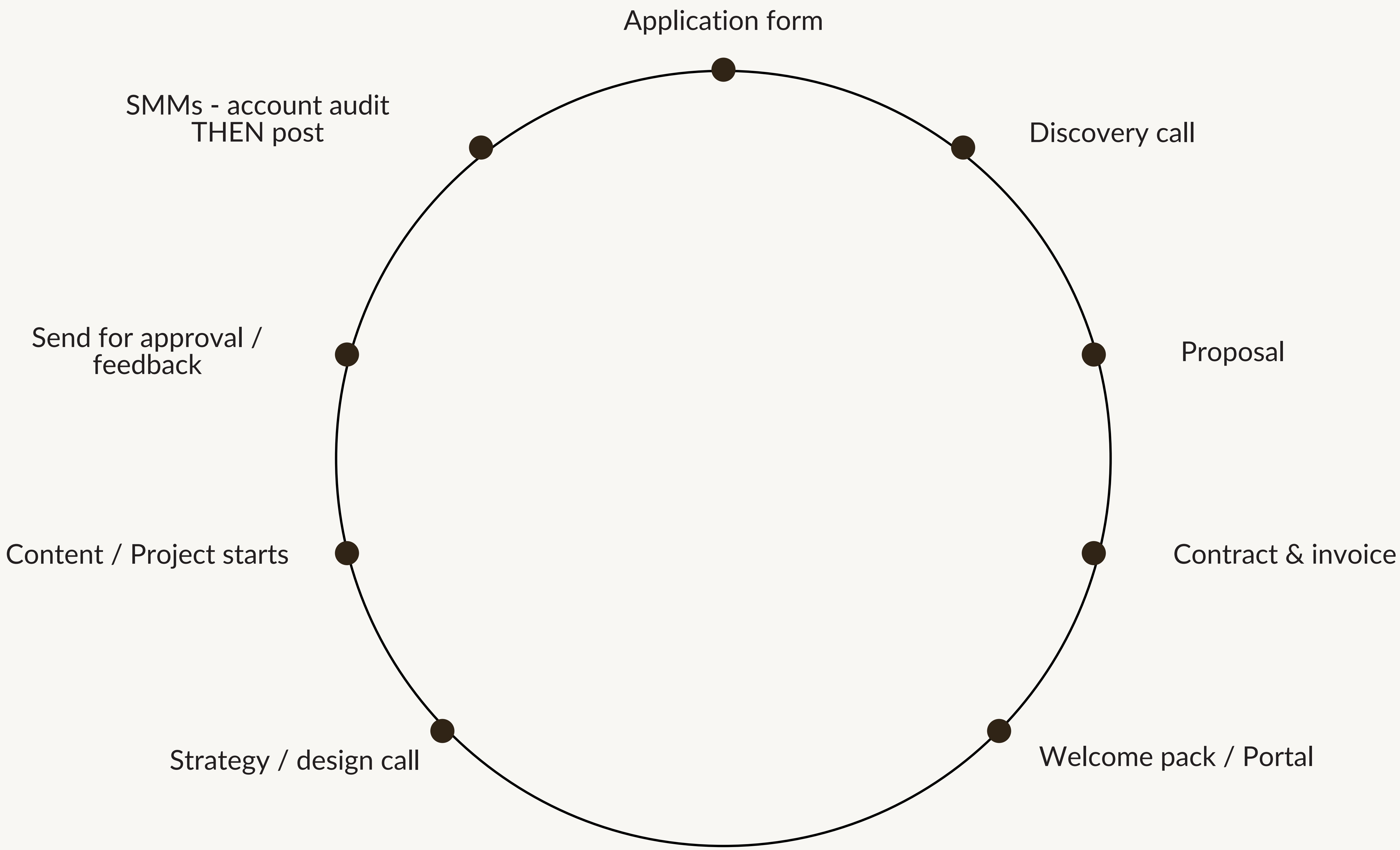
Discovery call

Send proposal within 48 hours.

They come back and say "Sounds good. I want to proceed"

You say "GREAT! Please send me your full name and address so we can get the contract signed."

THE ROADMAP TO ONBOARDING



Your PlayBook Practice

ACTION TASK

YOUR PLAYBOOK PRACTICE

Take 10–15 minutes to answer these prompts in your notes or a journal:

1. Identify 3 moments in your client journey where clear communication is essential (e.g. proposal, feedback, final delivery)
2. For each moment, jot down what you want to communicate, how you'll say it, and where it will live (e.g. in your welcome guide, during a call, via Slack)
3. Bonus: Write one sentence that sets a clear expectation, like "Feedback is due within 3 days to keep the project on track."

THE TEMPLATE VAULT

My recommended downloads for this module

Proposal Template

Let's secure that client

Welcome Pack Template

Showing the client the ropes

Paige.

Turn the Paige

AND FOLLOW THE PLAYBOOK

NEXT UP: BOUNDARIES & CLIENT COMMUNICATION