

# XENOTRIX

DIGITAL AGENCY

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OPERATIONS v1.0

# Client Onboarding Checklist


Every item to complete before, during, and after a client project — from deposit to retainer pitch.







[xenotrix.com](https://xenotrix.com) · [sk@xenotrix.com](mailto:sk@xenotrix.com)

PHASE 01	Payment & Agreement		
<input type="checkbox"/>	<b>50% deposit received</b>	Work does NOT begin until deposit clears. Confirm via bank/UPI/Razorpay notification.	<b>CRITICAL</b>
<input type="checkbox"/>	<b>Contract signed</b>	Send 1-page Xenotrix Service Agreement. WhatsApp "I agree" = minimum acceptance.	<b>COLLECT</b>
<input type="checkbox"/>	<b>Scope confirmed in writing</b>	Send accepted proposal back. Client replies "Confirmed" on WhatsApp. Screenshot it.	<b>ACTION</b>
<input type="checkbox"/>	<b>Added to Notion tracker</b>	Create project page: client name, deadline, deal value, GitHub repo, staging URL.	<b>ACTION</b>

PHASE 02	Content Collection		
<input type="checkbox"/>	<b>Logo received (PNG + SVG)</b>	Need transparent background version. If only JPG: use remove.bg (free) to extract.	<b>COLLECT</b>
<input type="checkbox"/>	<b>Brand colors &amp; fonts</b>	Ask for hex codes. If unknown: extract from existing site using browser color picker.	<b>COLLECT</b>
<input type="checkbox"/>	<b>All page text / copy</b>	Send content brief. Set 48-hr deadline. Document any delays — timeline shifts accordingly.	<b>COLLECT</b>
<input type="checkbox"/>	<b>Images / photos</b>	Business photos, products, team. If none: use Unsplash/Pexels free. Tell client in advance.	<b>COLLECT</b>
<input type="checkbox"/>	<b>Domain access</b>	Do they own it? Can they add you as DNS manager? If no domain: Cloudflare Registrar ~\$9/yr.	<b>ACTION</b>
<input type="checkbox"/>	<b>Contact details for site</b>	Phone, WhatsApp number, email, address, Google Maps link, social media URLs.	<b>COLLECT</b>

PHASE 03	Technical Setup		
<input type="checkbox"/>	<b>GitHub repo created</b>	Private repo: xenotrix/[client]-website. Add partner dev as collaborator. Commit Day 1.	<b>ACTION</b>
<input type="checkbox"/>	<b>Vercel project deployed</b>	Connect to GitHub. Share staging URL with client Day 2. Shows progress, builds trust.	<b>ACTION</b>
<input type="checkbox"/>	<b>Google Analytics 4 set up</b>	Create GA4 property. Add tracking code. Share access with client Gmail. Standard deliverable.	<b>ACTION</b>
<input type="checkbox"/>	<b>Google Search Console</b>	Add domain property. Verify via DNS. Submit sitemap after launch. Free SEO value.	<b>VERIFY</b>
<input type="checkbox"/>	<b>Contact form tested</b>	Submit test on mobile. Confirm email arrives. #1 broken thing on most sites.	<b>VERIFY</b>

	<b>SSL certificate active</b>	Vercel provides free SSL. Confirm https:// shows no browser warning before launch.	<b>VERIFY</b>
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PHASE 04	Handoff & Retainer Pitch		
	<b>Final 50% invoice paid</b>	Send remaining invoice on launch day. Site goes live after payment clears.	<b>CRITICAL</b>
	<b>Login credentials handed over</b>	Create secure doc with all passwords. Share via encrypted link. Never plain WhatsApp.	<b>SEND</b>
	<b>Loom walkthrough video sent</b>	Record 2-min Loom showing every feature. Reduces support questions by 80%.	<b>SEND</b>
	<b>Testimonial requested</b>	"Would you send a 2-sentence WhatsApp about your experience?" — ask every single time.	<b>ACTION</b>
	<b>Maintenance retainer pitched</b>	"\$200/month — we handle uptime, updates, monthly report. Want us to just manage it?"	<b>ACTION</b>
	<b>Referral ask made</b>	"Know any other business owners? We give you 10% of whatever they spend as thanks."	<b>ACTION</b>

<b>THE GOLDEN RULE</b>	Every completed project must result in 3 things: (1) final payment collected, (2) a testimonial, (3) a retainer pitch. If you leave without pitching the retainer, you left money on the table.
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