

XENOTRIX

DIGITAL AGENCY

OPERATIONS v1.0

Client Onboarding Checklist

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

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

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

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

SSL certificate active Vercel provides free SSL. Confirm https:// shows no browser warning before launch.

VERIFY

PHASE
04

Handoff & Retainer Pitch

Final 50% invoice paid	Send remaining invoice on launch day. Site goes live after payment clears.	CRITICAL
Login credentials handed over	Create secure doc with all passwords. Share via encrypted link. Never plain WhatsApp.	SEND
Loom walkthrough video sent	Record 2-min Loom showing every feature. Reduces support questions by 80%.	SEND
Testimonial requested	"Would you send a 2-sentence WhatsApp about your experience?" — ask every single time.	ACTION
Maintenance retainer pitched	"\$200/month — we handle uptime, updates, monthly report. Want us to just manage it?"	ACTION
Referral ask made	"Know any other business owners? We give you 10% of whatever they spend as thanks."	ACTION

**THE
GOLDEN
RULE**

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.