10.1 Onboarding Process Overview

Smooth client onboarding ensures project success and sets clear expectations.

10.2 Onboarding Checklist

10.2.1 Pre-Kickoff (Before Contract Signing)

- ✅ Proposal approved
- ✅ Contract signed (both parties)
- ✅ 50% deposit invoice sent and paid
- ✅ Client added to CRM (HubSpot/Salesforce)
- ✅ Project channel created (Slack or Teams)
- ✅ Kickoff meeting scheduled

10.2.2 Kickoff Meeting Agenda (Day 1)

Duration: 1-2 hours

Attendees: Client stakeholders, Project Manager, Lead Developer/Designer

Agenda:

1. Introductions (15 min)
2. Project overview and goals review (15 min)
3. Roles and responsibilities (10 min)
4. Timeline and milestones (15 min)
5. Communication plan (10 min)
6. Tools and access setup (15 min)
7. Content and asset collection plan (15 min)
8. Q&A (15 min)

Deliverables:

- Meeting notes shared via email
- Action items assigned
- Next meeting scheduled

10.2.3 Week 1: Information Gathering

Client Questionnaire (sent via Google Form or TypeForm):

Brand & Business:

- Company mission and values
- Target audience (demographics, pain points)
- Unique selling proposition (USP)
- Competitors (top 3-5)
- Brand guidelines (colors, fonts, logos)

Website/Project Specific:

- Websites you like (examples for inspiration)
- Websites you dislike (what to avoid)
- Must-have features
- Content: Existing copy, images, videos
- Integrations needed (CRM, email, payment gateways)

Technical:

- Domain name and registrar
- Current hosting provider (if redesign)
- Email hosting details
- Existing analytics tracking codes

Access Credentials (collected securely):

- Domain registrar login
- Hosting cPanel/FTP
- WordPress admin (if applicable)
- Google Analytics
- Google Search Console
- Social media accounts (for integration)

10.2.4 Week 1-2: Initial Work

- Sitemap created and approved
- Wireframes designed (low-fidelity)
- Content outline shared (client fills in copy)
- Technical setup (dev environment, repo)

10.3 Client Responsibilities Document

We Need From You:

1. Timely Feedback: Respond to design/development reviews within 3-5 business days
2. Content Provision: Provide text, images, videos by agreed deadlines
3. Decision-Making: Designate one point person for approvals
4. Access: Provide login credentials when requested
5. Availability: Attend scheduled meetings (or send delegate)

Consequences of Delays:

- If client feedback delayed > 2 weeks: Project timeline extended accordingly
- If content not provided: We may use placeholder content or delay launch
- No penalties for us if client-caused delays

10.4 Tools & Access Setup

10.4.1 Communication Tools

- Slack/Teams: Invite client to dedicated project channel
- Email: Use project-specific email thread
- Video Calls: Zoom or Google Meet links shared

10.4.2 Project Management

- Client Portal: Access to ClickUp or Asana board (view-only or collaborator)
- File Sharing: Google Drive folder (shared)

10.4.3 Design Review

- Figma: Invite client to view designs and comment

- InVision: For interactive prototypes (if applicable)

10.4.4 Staging Site

- URL: dev.clientname.com or staging.unisoftwares.pk/clientname
- Password: Provided via secure channel
- Purpose: Client reviews work-in-progress

10.5 Content Collection Strategy

10.5.1 Content Checklist for Websites

Homepage:

- Headline (10-15 words)
- Subheadline (20-30 words)
- Hero image or video
- 3-5 key benefits/features
- Call-to-action (CTA) text

About Page:

- Company story (200-300 words)
- Team photos and bios
- Mission/vision statements
- Awards/certifications

Services Pages:

- Service descriptions (150-250 words each)
- Benefits/features
- Pricing (if applicable)
- Case studies or examples

Contact Page:

- Business address
- Phone number

- Email address
- Business hours
- Contact form questions

Blog:

- 3-5 initial blog posts (if content marketing included)

Images:

- Logo (high-resolution, vector if possible)
- Team photos (professional headshots)
- Product/service images
- Office photos (optional)
- Icons (or we source)

10.5.2 Content Guidelines

- Format: Google Docs or Word documents
- Naming: "ClientName_PageName_Content.docx"
- Images: High resolution (minimum 1920px width for hero images)
- Deadline: 2 weeks from kickoff (or per agreed schedule)

10.6 Approval Process

10.6.1 Design Approvals

Round 1: Homepage mockup

- Client reviews and provides feedback
- We revise (up to 3 rounds included)

Round 2: Internal pages

- After homepage approved, we design remaining pages
- Client reviews batch of 3-5 pages
- Revisions as needed

Final Approval: Sign-off required before development starts

10.6.2 Development Milestones

Milestone 1: Staging site ready (50% development complete)

- Client reviews functionality
- Provides feedback on user experience

Milestone 2: Content populated (80% complete)

- All pages have final content
- Client reviews for accuracy

Milestone 3: Final review (95% complete)

- Last chance for minor tweaks
- Launch readiness checklist completed

Milestone 4: Launch (100%)

- Site goes live
- 30-day post-launch support begins

10.7 Payment Schedule

10.7.1 Standard Payment Terms

50% Deposit: Upon contract signing (before work starts) 30% Mid-Project: At milestone 1 or 2 (design approval or development midpoint) 20% Final Payment: Before final launch/handoff

10.7.2 Retainer Clients

- Monthly invoice sent 1st of month
- Payment due within 7 days
- Services paused if payment 15+ days overdue

10.7.3 Late Payment Policy

- 7 days grace period
- After 7 days: 5% late fee applied
- After 15 days: Work paused
- After 30 days: Project terminated, deposit non-refundable

10.8 Post-Launch Support

10.8.1 Warranty Period (Included)

Duration: 30 days after launch (varies by package)

Covered:

- Bug fixes (functional issues)
- Browser compatibility fixes
- Performance optimization (if issues arise)
- Emergency security patches

Not Covered:

- New features or design changes
- Content updates (beyond minor typo fixes)
- Third-party plugin/service issues
- Issues caused by client modifications

10.8.2 Training

Included Training (1-2 hours):

- How to update content (WordPress, CMS)
- How to add blog posts
- How to manage products (e-commerce)
- Basic troubleshooting

Format: Screen-share session + recorded video for reference

10.8.3 Transition to Maintenance

After warranty period:

- Offer maintenance plan (see Web_Development_Service_Documentation.pdf, Section 8.5)
- OR provide as-needed support (hourly rate)

FAQs (Client Onboarding)

Q1: What information do I need to provide at the start?
A: Brand guidelines, website content, images, access credentials, and feedback on design preferences. (Source: Client_Onboarding_Guide.pdf, Section 10.2.3)

Q2: How do I review design mockups?
A: We'll invite you to Figma where you can view designs and leave comments directly. (Source: Client_Onboarding_Guide.pdf, Section 10.4.3)

Q3: What's the payment schedule?
A: 50% deposit upfront, 30% at mid-project milestone, 20% before launch. (Source: Client_Onboarding_Guide.pdf, Section 10.7.1)