



CLIENT ONBOARDING OVERVIEW

2025/2026

The early stages of a project are where clarity, expectations and trust are established. While every project is unique, and we tailor our onboarding approach to suit your specific needs and goals, the outline below provides a general structure for how we begin our work together across each service area.

We work across social media, advertising, branding, email marketing and web design, always beginning with a clear understanding and a well-organised plan.

The process below outlines what you can expect, depending on the services we are delivering.

1. Organic Social Media Management

Initial Setup

Once your project is confirmed, we provide a service agreement outlining scope, deliverables, timelines and payment terms. A shared Google Drive folder is set up for asset storage and approvals.

Planning and Discovery

We conduct a session to discuss your brand, audience, objectives and tone of voice. This informs your content strategy and ensures alignment before we begin any creative work.

Notion Board Access

You will be added to a private Notion board where all monthly content will be presented. This is where you can review, provide feedback and approve content ahead of scheduling.

Content Creation

We create the first month of content including visual assets, captions and platform-specific formatting. Content reflects your goals, values and brand voice.

Review and Approval

Once ready, content is uploaded for your review in Notion. You can request edits or approve directly. Approved content is then scheduled for publication.

Initial Monitoring

During the first month, we monitor engagement and note performance trends. These insights help refine future content planning.

2. Paid Social Advertising

Agreement and Access

We provide a formal agreement and request access to the relevant ad platforms. If you are not set up on Meta Ads Manager or LinkedIn Campaign Manager, we can guide you through the process.

Planning Session

A session is held to define campaign objectives, target audiences, creative direction and key metrics. This ensures the campaign is built with precision.

Creative Development

Our team designs the ad creatives and writes copy tailored to your audience and campaign goals. Each ad is developed to meet platform specifications.

Campaign Build and Review

We build the campaign within the ad platform, including targeting, placements and budget. You will be given the opportunity to review and approve all elements before launch.

Launch and Optimisation

Once live, we monitor performance and apply any necessary early-stage adjustments. Updates are shared with you during the first review period.

Performance Reporting

For ongoing campaigns, we deliver monthly performance reports and offer recommendations for optimisation or scaling.

3. Email Marketing

Agreement and Platform Setup

We confirm your email marketing requirements and request access to your chosen platform. If you do not yet have one, we can recommend and assist with setup.

Content Planning

We discuss the purpose of the campaign, audience segments, tone of voice and messaging structure. If automation or sequences are involved, we will outline the flow at this stage.

Design and Copywriting

Our team produces the email design and writes copy consistent with your brand. The draft is shared with you for review and final approval.

Scheduling or Delivery

Once approved, the campaign is scheduled through your email platform or supplied to you for internal scheduling, based on your preference.

Post-Campaign Review

We monitor performance indicators such as open rates, click-through rates and engagement. Where applicable, we share insights to inform future campaigns.

4. Branding and Design Projects

Agreement and Discovery

The process begins with a signed agreement and an in-depth discovery session. We explore your business goals, market positioning, customer base and visual preferences.

Research and Direction

We conduct competitor and creative research to inform the direction of the brand identity. This may include the presentation of a moodboard or initial design outline.

Concept Development

Initial concepts are developed and presented for review. We explain the rationale behind each direction and gather your feedback for refinement.

Final Assets Delivery

Once a final direction is approved, we prepare a full brand package including logos, colour codes, typefaces and any usage notes outlined in your project scope.

Implementation Support

If rollout is included, we begin applying the brand across digital or print assets as specified, such as social templates or business stationery.

5. Website Design and Development

Agreement and Briefing

We issue a detailed scope of work outlining structure, functionality, content requirements and deadlines. You will also receive a checklist to help gather necessary content and materials.

Wireframes and Design

We develop wireframes to confirm the site layout, followed by visual design concepts for the key pages. This stage ensures user flow and branding are aligned before development begins.

Website Build

Once approved, the site is built on the agreed platform. All work is tested for performance, mobile responsiveness and accessibility.

Client Review

You will be invited to review the site via a preview link. Final edits are gathered and implemented before launch.

Launch and Handover

The site is made live and you will receive basic training or a handover guide. Ongoing support is available if agreed in your package.