

[Your Company]

Welcome Guide

Simple Guidelines For Successful Brand
Identity & Web Design Projects

Welcome!

I want to thank you, [Client] for letting us into your world and being a part of this project.

The start of any new project is filled with excitement and possibilities, but also questions. This welcome guide is meant to be a resource for you to know what to expect and be a roadmap to lead you through our services, policies and work processes so we can get the most out of working together.

Now's also a good time to remember why we are here and what we are trying to achieve with this project.

Project Goals

We understand how hard it can be to [Describe Client's Problem] so [Your Company Name]'s objective is to help you [Primary Objective] and [Secondary Objective].

(Example: "We understand how hard it can be to make consistent sales online, so ABC's objective is to help build XYZ's brand and drive targeted traffic to your online store.")

With over [Amount of experience your company has], you've made an excellent decision by choosing to work with [Your Company Name]! We have expert knowledge in [What you do well and who you do it for.]

(Example: "With over ten years experience in creating brands in the online retail space, you've made an excellent decision by choosing to work with ABC Company! We have expert knowledge in helping build and grow brands with pricing power for online fashion brands.")

To do that, first, we'll [summarize your company's process in a few sentences or a numbered list].

Please take a look at the rest of this guide to get familiar with my process and procedures.

With gratitude,

[Your Name]

Our Process

Below is a summary of our process for brand identity and website design.

1. Qualifying

We are selective. We believe we are not right for everyone. We want to make sure we are the best match for our clients so that we have the best chance at meeting our client's business goals. If you are reading this, congrats! It means we've both determined we are a good fit to work together—we can't wait to get started!

2. Strategy

Every project starts with research, discovery, and planning. We'll discuss all the details and goals of your project and make sure we are pointed in the right direction. We'll collaborate on the marketing strategy, map out all the requirements for the project and identify what success looks like for your business. We'll also come to an agreement on what we will create. We'll develop a sitemap for the website and create a mood board to help define the visual direction. At the end of this phase, you'll receive a creative brief document we'll use to keep us on track during the project.

3. Brand Identity Design

With agreement on where we're headed—both from a business standpoint and a visual design standpoint—we'll get to work on your brand ID. We'll present [Number of concepts] initial logo concepts with a maximum of [Number of revision rounds] rounds of revisions. We'll provide [Number of color options] color palette options and [Number of type options] typography options for the brand.

4. Website Design

We'll design one concept for the site using your new brand identity, sitemap and strategy agreed on during the Strategy phase. A maximum of [Number of revision rounds] rounds of revisions is allowed. From this initial base template, we'll create the additional page templates for the rest of the website. All designs will need to be approved before moving on to the development phase.

4. Website Development

Using [Project management software (example: Basecamp)] to communicate, keep us on track and moving forward, we'll use the approved website design templates to create your new custom, mobile-friendly, responsive, WordPress theme.

5. Content

Once the development is finalized, you'll add in all your content to the beta site. Unless we've agreed otherwise, the content falls under your responsibility. To launch according to the time line, please start gathering up all of your content (copy, photography) well in advance of this phase. For a redesign, any existing blog posts will already be imported into your new site (though it won't affect your current "live" site).

6. Launch!

We'll test the site for any bugs to make sure everything is working correctly. Once everything looks good, we'll publish the site and monitor to make sure all functionality is still behaving properly. Then, we'll pop the champagne!

Working Together

Below are a few guidelines learned through the years that will help us make sure we reach our project goals in the shortest amount of time possible. These are tried and true policies that have worked with other clients and are likely to work with you too.

1. Trust Yourself

Trust that you have made the right hiring decision and help us do the job you hired us to do.

A lack of trust will derail the project almost immediately. So if you do have worries, get them out into the open as soon as possible. Letting something fester will only make things worse.

2. Respect The Process

Relinquishing control is really hard to do! We get it—especially if you have been doing everything in your business by yourself up until now. But we (kindly) ask that you allow us to do our job when it comes to the design work.

That means we won't accept any design comps from you. If you or someone on your team start using Illustrator or Photoshop to create design ideas for us to execute, you are doing our job, and we'll have to halt the project.

We can save a lot of time and effort by avoiding this situation altogether.

We need your participation in the process—your participation is critical to making sure we achieve our project goals—but this is something that only works when we stick to our roles throughout the project. We need to do this together with us as the design experts and you as the business expert.

Debate Is Healthy

Although you should trust and have confidence in us to do our job, it doesn't mean you should blindly say yes to everything we present to you if it doesn't sit well with you.

Instead, ask questions. A design consultant should have a thought process for making design decisions. If you ask, we'll always explain our reasoning. Then we can decide together if that reasoning makes sense. If you feel something is not working, please tell us.

Honest communication is the way to keep the project healthy. There will be arguments. Welcome them. Some might even be heated arguments. That is healthy, and you should expect it.

Stick To The Strategy

Think of the project as a canyon. You are on one side. Your destination (project goal) is on the other side. From our point of view, we can see down into the valley, and we chart a course down and then up the other side. But once we get down there, inevitably there are things that we couldn't see from the top. Brush is blocking our path, the river is deeper than expected, etc. So we change course a bit, but your destination stays the same.

Small course corrections are natural and to be expected, but a change in destination means regrouping and re-charting the course.

If you change your strategy, that means our destination is no longer the other side of the canyon. It's somewhere else. When that happens, the entire course needs to be reexamined—and there is a cost involved with that.

Sometimes that's what is necessary. We completely understand that, but it also means that we will close out this project, and start over with a new project.

Weekly Report

Every Friday, we'll send out a short email report detailing where we are in the project, what we are working on next, and what (if anything) we need from you.

This weekly recap keeps us on track and makes sure that if we are going off the rails a bit, we can quickly course correct without getting too far down the road. It also keeps you in the loop about what's happening, when you can expect the next set of deliverables, and so forth.

The report keeps the project running smoothly and on time and pushing us towards our project goals by keeping everyone engaged and on the same page.

Sticking to these simple guidelines will help us make sure we reach our project goals in the shortest amount of time possible.

Client Responsibilities

Along with being a friendly human :) we'll need you to get acquainted with a few tools we use with our clients for feedback, file management and staying on track. When you have a chance, please take a look at these tools:

Basecamp [link to an explainer video]

Conceptboard [link to an explainer video]

Dropbox [link to an explainer video]

Content

We'll need you to set aside time to devote to this project. A good chunk of that time will go towards gathering all the content needed for the website. You are responsible for all content (copy, photography). To be perfectly honest, most launches get delayed because the content wasn't delivered on time. Please plan for this.

Feedback, Revisions & Approvals

The rest of the time will go towards giving us feedback so we can make any necessary changes.

Piecemeal requests slow our momentum down to a crawl and will unnecessarily delay the project, so we ask you to contain your feedback and changes to one list of requests at a time. Each list accounts for one round of revisions.

Additional rounds of revisions (if needed) will cost \$[Fill in amount] per round.

Once you are satisfied with the work, we'll need you to approve it (in writing). Approval means you've agreed to move forward and are satisfied.

Approval works like the Panama Canal: each approval moves us forward to the next phase. Once approved, we won't go back and make changes, so please be aware of this.

Staying On Schedule & Communicating

Please give us a heads up if something comes up and you are not going to meet a deadline. This will allow us to stay informed and plan accordingly.

Otherwise, we'll have to put the project on hold.

One of your responsibilities as a client is to communicate with us in a timely fashion. We pledge to do the same with you.

What we are looking for is communication in a reasonable amount of time. It doesn't have to be set in stone what that time frame is, but if you disappear for more than 10 business days without letting us know you'll be out of town or unavailable, the project will be put on pause, and all work will stop. We don't want that to happen.

If the project is paused, re-activating it will be at our discretion, and it could be weeks before we can get you back into our work flow.

Policies

Our Availability To You

Emailing [Primary point person] at [Your Email address] is the best way to get in touch. We always respond within [Your Response Time].

You can also email [Secondary point person email address] with any questions.

If you need to call, [Your Phone Number] is the best number to reach [Primary point person].

You can reach [Secondary point person] at [Secondary point person phone number].

Our office hours are [Your Office Hours]. If you email or call outside of those times, and it's not urgent, we'll likely not respond until the next day (or Monday if it's after [Your Office Hours] on Friday).

We also take a vacation from time to time. Usually twice a year. Once around the end of the year between Christmas and New Years, and another during summer.

We'll do our best not to interrupt the project, but if necessary, you will know about any vacations well in advance. We also observe most major holidays like [Insert Holidays You Observe].

Payment Info

Invoice Payments

We offer payment (on invoices up to \$2500) via credit card online. You'll receive a link via email to pay the invoice online. All major credit cards are accepted.

For invoices over \$2500, we request a check be sent to:

[Your Company]

[Your Address]

[Your Address]

Terms

All invoice payments are due upon receipt.

Fee Schedule

You agree to pay the Fee of \$[insert fee amount] in the following installment dates or upon delivery of (project milestone, design files, etc.). Whichever comes first:

Payment	Date
\$xxxxx	Due upon signing
\$xxxxx	January 1, 2017
\$xxxxx	January 2, 2018

So What's Next?

For now, the next thing you can do is simply get excited! Take a moment to reflect. You are taking a huge step forward in your business, and some celebration is in order before tackling the challenging work we have ahead of us.

Up next we'll have our project kickoff meeting to review the project goals and clarify any questions you have about the process and policies described here.

Until then.

With gratitude,

[Your Name or team name]

Thank You