PLANVORA

Client Onboarding

Kit

A PREMIUM SYSTEM FOR A BETTER CLIENT EXPERIENCE

Welcome • Discover • Plan • Deliver • Retain

Designed for freelancers, agencies, consultants and service businesses.

INTAKE

KICKOFF

DELIVERY

FEEDBACK

RETENTION

TOOLS FOR A BRIGHTER BUSINESS

WORKFLOW

How the Client Journey Works

A clear path from first contact to a confident handoff.

01 **INTAKE**
Collect context

02 **DISCOVER**
Clarify goals

03 **SCOPE**
Define deliverables

04 **KICKOFF**
Align everyone

05 **DELIVER**
Manage the work

06 **FEEDBACK**
Capture decisions

07 **HANDOFF**
Close cleanly

08 **RETAIN**
Create the next step

INTAKE

Client Intake Form

Collect the essentials before work begins.

Client / company:

Start date:

Primary contact:

Decision maker:

Service purchased:

Preferred communication:

Project name:

Important links:

CLIENT NOTES

Capture decisions, context and examples.

DISCOVERY

New Client Questionnaire

Understand the business behind the request.

What do you do?

What has been tried?

Who do you serve?

What should we avoid?

What is the current challenge?

What matters most?

What would success look like?

Anything else to know?

CLIENT NOTES

Capture decisions, context and examples.

GOALS

Client Goals Worksheet

Turn vague requests into measurable outcomes.

Primary goal:

Target:

Secondary goal:

Deadline:

Success metric:

Priority:

Baseline:

How will we know it worked?

CLIENT NOTES

Capture decisions, context and examples.

BRAND

Brand Discovery

Capture the brand context before creating.

Brand promise:

Visual direction:

Positioning:

Competitors:

Audience:

Words to use:

Brand personality:

Words to avoid:

CLIENT NOTES

Capture decisions, context and examples.

AUDIENCE

Audience Profile

Define the people the work must resonate with.

Primary audience:

Needs:

Pain points:

Desired outcome:

Buying triggers:

Objections:

Where they spend time:

What earns trust:

CLIENT NOTES

Capture decisions, context and examples.

BRIEF

Project Brief

Create one source of truth for the engagement.

Project objective:

Key message:

Scope:

References:

Deliverables:

Deadline:

Audience:

Approval process:

CLIENT NOTES

Capture decisions, context and examples.

SCOPE

Scope of Work Planner

Make expectations visible before execution.

Included:

Timeline:

Not included:

Client responsibilities:

Deliverables:

Provider responsibilities:

Revisions:

Change request process:

CLIENT NOTES

Capture decisions, context and examples.

DELIVERY

Deliverables Checklist

Know what must be delivered and approved.

Deliverable 1:

Owner:

Deliverable 2:

Due date:

Deliverable 3:

Review status:

Format / specs:

Final approval:

CLIENT NOTES

Capture decisions, context and examples.

TIMELINE

Project Timeline

Map milestones instead of chasing dates.

Kickoff:

Revision:

Milestone 1:

Final approval:

Milestone 2:

Delivery:

Review:

Follow-up:

CLIENT NOTES

Capture decisions, context and examples.

COMMUNICATION

Communication Preferences

Prevent avoidable communication friction.

Primary channel:

Who receives updates?

Response window:

Urgent issues:

Meeting cadence:

File-sharing method:

Who approves?

Notes:

CLIENT NOTES

Capture decisions, context and examples.

KICKOFF

Kickoff Agenda

Run a focused first meeting.

Welcome + context

Project goals

Scope + deliverables

Timeline + milestones

Roles + approvals

Questions

Risks / dependencies

Next actions

WELCOME

Client Welcome Guide

Set expectations while making the experience feel premium.

Welcome message:

Communication:

Feedback rules:

What we need from you:

How we work:

Timeline:

File sharing:

Next milestone:

ASSETS

Asset Request Checklist

Get everything required before production.

Brand files

Logos

Copy / content

Images

References

Access

Existing analytics

Final approvals

CHECKLIST

Project Kickoff Checklist

Make the first working day organized.

Contract confirmed

Payment confirmed

Brief received

Assets received

Scope confirmed

Timeline approved

Communication confirmed

Kickoff completed

MEETINGS

Meeting Notes

Turn every meeting into decisions and actions.

Date / attendees:

Decisions:

Client feedback:

Open questions:

Action 1:

Action 2:

Owner:

Due date:

STATUS

Project Status Update

Give clients confidence without over-explaining.

Current status:

Completed:

In progress:

Waiting on client:

Next milestone:

Risks:

Decision needed:

Next update:

FEEDBACK

Feedback Form

Collect useful feedback instead of vague revisions.

What works?

What needs change?

What should stay?

Priority change:

Reference / example:

Final decision:

Approver:

Deadline:

REVISIONS

Revision Tracker

Keep changes controlled and visible.

Revision request:

Source / page:

Priority:

Owner:

Due:

Status:

Approved by:

Notes:

CONTROL

Change Request Form

Protect scope while keeping changes professional.

Requested change:

Why it is needed:

Impact on scope:

Impact on timeline:

Impact on fee:

Approved by:

Decision:

Effective date:

CONTROL NOTES

Keep decisions documented and visible.

APPROVAL

Approval Tracker

Never lose the final yes.

Item:

Feedback due:

Version:

Approved date:

Sent date:

Final file:

Reviewer:

Status:

CONTROL NOTES

Keep decisions documented and visible.

ACCESS

Access & Login Checklist

Request only the access needed to do the work.

Platform:

Expiration:

Access type:

Security note:

Owner:

Returned / removed:

Received:

Status:

CONTROL NOTES

Keep decisions documented and visible.

CONTENT

Content Collection Sheet

Centralize client-supplied information.

Asset / content:

Due:

Source:

Received:

Format:

Used in:

Owner:

Notes:

CONTROL NOTES

Keep decisions documented and visible.

BRAND

Brand Assets Checklist

Make brand consistency easier to maintain.

Logo files

Image library

Color codes

Templates

Fonts

Voice examples

Brand guidelines

Usage restrictions

CONTROL NOTES

Keep decisions documented and visible.

RISK

Project Risk Register

Spot issues before they become surprises.

Risk:

Owner:

Likelihood:

Mitigation:

Impact:

Due:

Early signal:

Status:

CONTROL NOTES

Keep decisions documented and visible.

RETENTION

Client Health Score

Know when an account needs attention.

Communication:

Results:

Timeliness:

Relationship:

Satisfaction:

Overall score:

Scope stability:

Next action:

CONTROL NOTES

Keep decisions documented and visible.

HANDOFF

Project Handoff

Make delivery feel complete, not abrupt.

Final deliverables:

Source files:

Usage notes:

Credentials / access:

Maintenance notes:

Training / walkthrough:

Client confirmation:

Handoff date:

CONTROL NOTES

Keep decisions documented and visible.

EMAIL

Welcome Email Templates

Start the relationship with clarity and warmth.

Subject: Welcome to [Business]

Opening:

What happens next:

What we need:

Timeline:

Communication:

Next action:

CLIENT EXPERIENCE

Clarity builds trust.
Consistency builds retention.

Make every touchpoint feel intentional.

EMAIL

Kickoff Email Template

Confirm the project after the first meeting.

Subject: Project kickoff confirmed

Recap:

Scope:

Milestones:

Client actions:

Provider actions:

Next meeting:

CLIENT EXPERIENCE

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Consistency builds retention.

Make every touchpoint feel intentional.

EMAIL

Status Update Email

A concise update clients actually want to read.

Subject: Project update — [Project]

Completed:

In progress:

Waiting on:

Next milestone:

Decision needed:

Next update:

CLIENT EXPERIENCE

Clarity builds trust.
Consistency builds retention.

Make every touchpoint feel intentional.

EMAIL

Feedback Request Email

Make feedback specific and easy to give.

Subject: Quick feedback needed

What to review:

Questions to answer:

Deadline:

How to send feedback:

What happens next:

CLIENT EXPERIENCE

Clarity builds trust.
Consistency builds retention.

Make every touchpoint feel intentional.

EMAIL

Final Delivery Email

Turn delivery into a polished final moment.

Subject: Final delivery — [Project]

What is included:

How to use it:

Files:

Next steps:

Support window:

Thank you:

CLIENT EXPERIENCE

Clarity builds trust.
Consistency builds retention.

Make every touchpoint feel intentional.

EMAIL

Testimonial Request

Ask for proof without sounding pushy.

Subject: Could I ask one quick favor?

Result achieved:

Short questions:

Where to submit:

Permission:

Thank you:

CLIENT EXPERIENCE

Clarity builds trust.
Consistency builds retention.

Make every touchpoint feel intentional.

REFERRALS

Referral Request

Create a natural path to introductions.

Who is a good fit?

Why they would benefit:

What to say:

Introduction channel:

Follow-up:

Thank-you action:

CLIENT EXPERIENCE

Clarity builds trust.
Consistency builds retention.

Make every touchpoint feel intentional.

RENEWAL

Retainer Renewal Planner

Turn a completed project into the next engagement.

Current results:

Ongoing need:

Next opportunity:

Recommended scope:

Timing:

Value case:

Offer / package:

Next conversation:

CLIENT EXPERIENCE

Clarity builds trust.
Consistency builds retention.

Make every touchpoint feel intentional.

AI

AI Client Communication Prompts

Use AI to draft faster while keeping human judgment.

Draft a warm onboarding email for [client] based on this brief: [brief].

Turn these meeting notes into decisions, owners and deadlines: [notes].

Rewrite this status update to be concise, calm and client-friendly: [text].

Turn this feedback into a prioritized revision list: [feedback].

Draft a professional response to this change request: [request].

Summarize this project into a client-ready handoff: [details].

Create 5 thoughtful testimonial questions for this project: [project].

Suggest 3 ethical upsell opportunities based on this client's goals: [goals].

ACTION

30-Day Client Experience Plan

Build a repeatable rhythm for communication and retention.

Week 1 — Intake + discovery

Week 2 — Kickoff + first milestone

Week 3 — Feedback + progress

Week 4 — Delivery + next opportunity

Daily non-negotiable:

Weekly client touchpoint:

Metric to watch:

Review date:

QA

Client Experience Scorecard

Run a final quality check before closing the project.

- ☐ Expectations were clear
- ☐ Scope was documented
- ☐ Timeline was visible
- ☐ Communication was consistent
- ☐ Feedback was captured
- ☐ Revisions were controlled
- ☐ Deliverables were checked
- ☐ Handoff was complete
- ☐ Client confirmed receipt
- ☐ Testimonial / referral opportunity considered
- ☐ Next step offered
- ☐ Project archived

FINAL

PLANVORA

Better clients.

Better systems.
Better business.

A premium onboarding system that turns scattered client management into a clear, repeatable experience.

INTAKE	DELIVERY	FEEDBACK	RETENTION
CLARITY	CONTROL	CONFIDENCE	GROWTH