

Client Project Scripts

I have incorporated what is traditionally called the “Welcome PDF” into my Asana projects. I no longer send a PDF. Some of the PDF’s content is in this email script and some is in the Asana tasks I ask my clients to complete as part of *Getting Started*.

I find that one more thing (as visual as it is), is just one more thing so I streamlined it. There is no right or wrong here. Just whatever is on brand for you. If you determine your client needs help with your project tool, include a video link with a brief introduction to the project.

Sample Welcome Email Script

Subject: Welcome to your design project!

Dear client,

Please read this email all the way through! Let’s get started...

We will be working closely together over the next few months. I will be learning all that I can about you and your business. Your success is important to me! I take my projects seriously and limit the number of people I work with at one time, so I can give your project the focus it deserves.

I want to encourage you to communicate with me throughout our work together. It’s natural for additional ideas and possibilities to flow from conversation and collaboration. This is totally normal and part of the process. Sometimes throughout the course of our work together, the direction or scope of the project may change or grow. If this happens, we will re-evaluate and adjust the cost if we mutually agree – or we can discuss what a “phase 2” might look like. I want you to feel free to think big.

The process may not always be smooth. There’s no getting around it, a project like this is a lot of work. Make sure you schedule plenty of time to actively engage. If you ever feel overwhelmed – or have doubts or questions – please let me know right away. Feel free to ask for clarification if you are unsure about a part of the process, the meaning of specific web terms, or have questions about what’s next. There’s no question too basic.

You know your business better than I do. There’s a sweet spot at the intersection of your knowledge of your business and my ability to bring your message and goals to life in a visual way and that is what we are aiming for. I’m looking forward to strategically partnering with you.

NEXT STEP: You will be invited to join me in Asana, where I will be managing the progress of your project. Please accept the invite and find the task assigned to you entitled "Start Here".

I’m excited to be a part of your business journey!

- Your Name

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---- SETUP THE CLIENT PROJECT IN ASANA

Asana Board: *Getting Started*

Assign the following tasks to your client. I like to leave *Getting Started* tasks always visible in board view in case they need to be referenced later.

- Welcome [Client Name] – start here

Mark this complete after you have read it thoroughly or reply to this task and tag me if you have any questions.

[Video is optional if your client is well-versed in Asana] Watch the welcome video! [Insert link for personalized welcome video demonstrating how to navigate their project - recommend using useloom.com]

Because there are so many moving parts, Asana is where we will keep all project communication for reference throughout this process. We will also use Asana for securely housing passwords, passing files back and forth, and setting up a project timeline.

A few things to remember:

1. Please read tasks thoroughly. It's easy to jump straight ahead to the visual stuff and skim my notes to you. Communicating clearly will save us both time and effort.
2. On every task I assign to you, I will either ask you to mark it complete or assign it back to me when you are finished. This keeps all information relevant to that task in one place.
3. In the upper left hand navigation, please check *My Tasks* and *Inbox* daily during our work together. If you commit to checking daily, you can turn off Asana email notifications in your profile.
4. Asana can take a little getting used to if you haven't used it before. If you have any questions, reply inside any task where you have a question and tag me using the "@" in front of my name.

- Office Hours + Meetings + Communication

Mark this complete after you have read it thoroughly or reply to this task and tag me if you have any questions.

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Office Hours

I'm usually working from [insert hours here].

Meetings

I am available for phone or zoom meetings on [insert days and times here] (additional times offered if needed due to time zone differences). Meetings are generally informal and optional but intended to add clarity and momentum to the process.

Communication

I prefer to keep all communication in Asana so it's easy for us both to access. If you send me an email or text related to the project, I will guide you back to Asana, as email and text communication can be easily lost in the shuffle over the course of a long project. If you need additional clarity on any step of the process, feel free to reply in the task and just ask for it. I will provide further help with info via video or on a call if necessary.

You might post a tentative project timeframe in this task if you have it, expectations for when you will hit major milestones, or you can create milestones in each section so they show up on the timeline feature and send the client there to look (this might be too much for non-savvy clients). Adapt this message it to your own project needs. This is mostly an opportunity to reiterate your rescheduling policy.

- Timeline + rescheduling policy

Mark this complete after you have read it thoroughly or reply to this task and tag me if you have any questions.

Please dedicate time in your schedule to this process. It's important that we keep as close to the original timeline as possible (which we will agree on together). Life does happen (for both of us) and I do understand that. Lack of response for days or missed deadlines without communicating ahead of time may cause your project to be moved to the end of my production schedule (and rescheduling fee will apply). So let me know as soon as possible if you need more time or if a specific due date is not going to work for you.

[insert project timeline]