

Onboarding review for a small web studio

Illustrative sample — fictional business, not client work or a testimonial.

A practical example of how an onboarding review can turn vague instructions into clear next steps. This fictional brief has three gaps to fix before kickoff: what the client must provide, who approves work, and how feedback reaches the studio.

The original onboarding brief

“Thanks for choosing our studio for your five-page website. Send over your copy, logo and images when you can. We will start next week and aim to launch in four weeks. Our designer will share the first draft and you can send feedback by email or chat. Let us know what you think and we will make changes until it looks right. If you need anything else, just ask. We will launch when everyone is happy.”

What the reviewer would flag

1. “When you can” conflicts with “start next week.”

There is no asset deadline or definition of a complete handoff. The client could expect the four-week clock to run while copy is still missing.

2. “Email or chat” leaves feedback scattered.

The brief does not name an approver or explain how several people’s comments become one set of instructions.

3. “Until it looks right” has no review boundary.

The brief does not distinguish agreed revisions from an extra page, new feature or a change to approved work.

Review boundary

This sample reviews clarity and workflow only. It does not determine commercial terms. The edits on the next page are proposed wording for the fictional studio to confirm against its existing project agreement. They are not EXPANDLANE service promises.

Three concrete edits

Proposed wording for the fictional studio to confirm before use.

1 Make the handoff usable

Before “Send over your copy, logo and images when you can.”

After “Before we confirm kickoff, please send final copy for Home, About, Services, Work and Contact; your logo files; and the images you want us to use, labelled by page. Add everything to the project folder linked in your welcome email. Tell us which items are missing and when you expect them. We will review the handoff and confirm the project schedule with you.”

Reviewer note This names the assets and the next action. Confirm the actual page list, folder and schedule process; do not silently change an already-agreed start date.

2 Give feedback one owner and one home

Before “You can send feedback by email or chat.”

After “Please name one person to approve the work. That person should gather your team’s comments and send one combined reply in the project email thread. For each change, include the page, the section and the requested edit. We will agree a feedback due date when we send each draft.”

Reviewer note The studio must confirm that email is its chosen review channel. Naming the approver prevents the team from having to guess whose comments take priority.

3 Separate revisions from additional work

Before “We will make changes until it looks right. If you need anything else, just ask.”

After “The project agreement sets the included pages, features and revision rounds. We will confirm which round each draft is in. If a request adds work outside that scope, we will explain any price or schedule change and ask for your approval before proceeding.”

Reviewer note Do not invent a revision allowance in the onboarding brief. If the agreement does not state one clearly, resolve that question before sending the pack.

A prioritized action checklist

For the fictional studio owner to apply before the next kickoff.

Priority 1 Resolve before sending the pack

Asset handoff: Confirm the five-page list and required files. Add the actual project-folder link and the agreed handoff date. The client should know what a complete submission contains.

Schedule: Reconcile “start next week” and “launch in four weeks” with the agreed project dates. Explain who confirms a revised schedule if required inputs arrive late.

Scope and revisions: Check that the brief matches the project agreement. Remove “until it looks right”; identify the included revision rounds without creating a new allowance.

Priority 2 Resolve at kickoff

Approval: Record one client approver and the studio contact. Agree how other stakeholders contribute comments and who resolves conflicting feedback.

Feedback: Use one channel and ask for page, section and requested change. Confirm a response date with each draft rather than leaving it implied.

Launch decision: Name the final approver and agree what must be checked before launch, including page content, links and contact-form routing. Record explicit approval in the project thread.

A quick self check

Give the welcome brief to someone unfamiliar with the project. Can they identify their next action, what to send, where to send it, who decides, and what happens next? Any answer they must guess is a useful place to revise.

Have your own pack reviewed

Client Onboarding Pack Review • US\$149 total

50% upfront (US\$74.50); 50% on base delivery (US\$74.50). Up to 3 documents / 2,500 words. Annotated documents plus a checklist of up to 2 pages. Delivery within 7 business days, Sunday-Thursday, after complete inputs and scope acceptance. One included revision; the listing's refund terms apply.

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