Show Notes

Season 4, Episode 10: Onboarding systems for clients and why you need them

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What's in this episode?

Hosts Rachel Smith from Rachel's List and journalist and content creator Lynne Testoni talk how to onboard a new client or editor properly (to save you a lot of stress and time)

In this episode we talk about:

- What onboarding systems are (briefing templates, processes, contact forms, calendar booking functions)
- Managing the expectations of the client
- Avoiding mistakes with client projects
- Why you should always be tweaking your systems
- How to plug common loopholes in your contracts by imagining worst case scenarios
- Communication / making sure you're on the same page. Does your client use Basecamp, Trello, Evernote, email? Operate entire in a CMS? Make all this clear from the start
- Roles and responsibilities – lock them down at the start
- Nailing the scope to ensure you ward off scope creep
- Invoicing at the onboarding stage – should you? And how much?

If you're still putting your systems together and need customisable contracts, we're giving podcast listeners a special deal on the Cor Blimey contract bundle – just use the code CORBLIMEY10BUCKS at check-out to get $10 off, til the end of August.

That's it for this episode. Hope you've found these show notes useful. Cheers, Rachel and Lynne

Got a question? Email us at thecontentbyte@gmail.com