

Service Guide Information

This service guide should include basic information that doesn't change from project to project. For example, all of the information and policies that are true for your branding package and that are also true for your website design package should be included.

This document aims to help your leads self-assess whether they are your target client or not. They may have a quicker deadline than what you deliver, or their budget is smaller than what you offer. These are things you'd want them to know before signing on to work with you so that they know what they're in for.

Please do not hesitate to write as much or as little as you can. If you do not want one of these actions below included inside your guide, please leave the response space blank.

WELCOME LETTER

This is a short letter to the person who scheduled a coffee chat or requested to download this guide. Thank them for their interest and tell them what they'll find inside.

EXAMPLE:

Thank you so much for your interest in working with [NAME] Creative Studio and on taking the first step toward up-leveling your brand or business. We're so excited for you and can't wait to see how we can work together. In this guide, you'll find a list of our services, starting prices, and a few tips to keep in mind along the way. We hope our service guide answers your questions. If not, please email any questions you may have to _____, and we will get back to you within 24 - 48 hours. Have a beautiful day!

Service Guide Welcome Letter*



WHAT TO EXPECT FROM YOU:

With this message, sell the reader a little more on why they should choose you. Choose three words that explain what working with you will be like and explain each one. The terms I would opt for myself are Whirlwind, Conversational, and Impactful.

Add your "what to expect from you section":

EXAMPLE:

IMPACTFUL: We believe that great design evokes emotion. We not only want to impact our clients' lives by elevating their brand identity and creating a digital home for their business but also impact the lives of their customers and clients. It's important to us to create something meaningful that will have a positive effect on others. Design is not all about selling – it's also about the imprint you leave on another person's heart.

COMMUNICATION POLICY

EXAMPLE:

Office hours and communication are often a service provider's most violated boundaries. If you don't work on nights or weekends, tell the reader now, so they'll know from the beginning. This section should include the following information:

- Days and Times you work
- How clients should communicate with you
 - Email through your CRM should be included, and using your new call scheduler
- A rough turn-around time for communication
- Any scheduling info they need to know

Add your "communication policy":

PAYMENT POLICY

Your payment amounts and payment plans may vary from package to package. However, if you have a standard payment schedule or plan, here is where to list it. You might have a 25% deposit and then request the rest before delivery, or you might do a 30%, 35%, 30% payment plan every two-three weeks after the contract is signed. Say that here.

Also, list your payment policies. How many days after the due date will you give your clients to submit payment? Is there a fee added for late payments?

Add your "payment policy":

OTHER POLICIES

If you have any other policies, please let the reader know here. As a branding and website designer in the past, I had a deadline and revision policy that added a fee for late feedback and extra revisions outside the scope of work. If you have another policy that you swear by, list it here.

Add your "other policies":

MAIN + ADDITIONAL SERVICES

Your service guide will list all of your services with the descriptions and details that you've provided in the Details Questionnaire.

We'll use an online project management app called Trello to keep all of our tasks, due dates, and conversations in one place. During projects, Trello is where we'll do most of our communication, but if you ever feel like you need to talk things over with us, you'll always have the option to schedule a call.



EXAMPLE

LATE PAYMENTS: Payments that are more than 14 days late will incur an additional cost of \$150. After the initial late fee, the client will incur an additional fee of \$100 a week until full payment is rendered plus any additional late fees the client has incurred.



EXAMPLE:

REVISIONS: With every project, we allow 2 refinements of designs before we pick our final direction. If you want to add more refinements, there will be a \$300 charge added to your final bill for each extra round.



TESTIMONIALS/REVIEWS/PORTFOLIO

Help your potential new clients make the final choice in hiring you by sharing some images of completed projects or happy words and results from previous clients. What they could be getting when working with you. Please be sure to include the client's name. It can be their first initial with their last name (J. Smith) or their first name with their last initial (Jane S.).

For portfolio photos or client headshots, please upload them below. Be sure to name the photos that match your reviews so that we can put them together.

Review 1:*

Review 2:*

Review 3:

Review 4:

Choose file(s) to upload

or drag files here to upload



THE PROCESS

With multiple services, your timelines could differ from package to package. However, you might have the same design process or project phases. Please try to compact your general process or project steps into 3-4 sections. They can be labeled for what happens: discover, create, implement, or simply by actions: step/phase 1, step/phase 2, step/phase 3.

Pro Tip: Do not add this booking stage as a part of your process. Your first step should be what happens after they are a client, such as homework they'll have or a meeting you'll schedule.

Step 1:*

EXAMPLE:

DISCOVER: We dive deep into discovering everything about your business, from the pain points to your dreams and goals for your business. This phase lays the foundation for your Brand Identity and the strategy behind your Website Design. During this phase, it's important to define your Ideal Client and Target Market to create a strategy that you love and attract and convert your ideal clients.

Step 2:*

CREATE: During this phase, we put our heads down and pen to paper to try out various styles, layouts, and all the things to see what designs strategically align best with you and your ideal client. At this point in the design process, there is minimal communication because there's a lot of work behind the scenes. When making your decisions on what aligns with your business and your ideal client, be sure to think from the viewpoint of a potential client or customer.

Step 3:*

IMPLEMENT: Now that we've approved and finalized your designs, it's time to implement them into every aspect of your business. First, we work together to create a launch strategy that will maximize the profits during the launch. The goal is to get your potential clients excited. During this phase, we create lead magnets and collateral to increase the hype around the launch and really draw in potential customers or clients. This is the fun part, so who's ready to say cheers?



Step 4:

FAQS

Please list any frequently asked questions here with their answers. This section should try to give the reader responses to any questions that weren't answered on your website or things you want to emphasize. These questions should help them figure out if they want to move forward with you or now.

and, want to move forward with, or not...

Question 1:*

Answer 1:*

Question 2:*

Answer 2:*

Question 3:*

Answer 3:*

Question 4:

Answer 4:

Question 5:

Answer 5:

Question 6:

Answer 6:

I agree that all of the information is correct and needs no further edits other than proofreading?*

Yes No



Save Draft

Send

