



Please download and review the process list template linked. Use this as an example for your own step-by-step processes and timelines. Feel free to copy what I have written if it fits your process.

When writing/listing your processes, ensure you have them for *all of your services*. Most services are different and will have a different processes for each of them. Some details will be the same, such as sending a proposal or onboarding questionnaire, but others will and should be different.

Every VIP Weekend comes with unlimited workflows for three services. You should have at least three different processes listed to tell me how you deliver each of your services. Don't worry about breaking them into workflows; I'll do that.

For the timelines, list out the days or weeks the client has to respond to you or when your deliverables are sent.

I have provided a template/example for processes for ONE service linked below. Please read the suggestions and prompts listed below to help you with your own process.

[Download Your Process Template](#)

You can either type in your processes with the fields below or edit the template and upload your completed copy.

**Upload your completed document below:**

or drag files here to upload



## LEAD Process

Think about how a client comes to you and what you want them to do after completing a contact form. Do they receive a Service Guide, do you request that they schedule a Consult Call, or do they do both?

Think about how one lead process might be different from another. Do leads for one service need to be reviewed for approval or rejection before you offer them a chance to speak to you, OR does everyone who completes a contact form get direct access to a link to schedule a call, OR do you even need a call? Perhaps once the contact form is completed, you review and approve their application and respond directly with a Proposal for them to move forward.

Write your lead processes for your three services in the spaces below. It's okay if they are all different or exactly the same!

### SERVICE 1:

Write your LEAD process for your service.

### SERVICE 2:

Write your LEAD process for your service.

### SERVICE 3:

Write your LEAD process for your service.

### SERVICE 4:

Write your LEAD process for your service.

your service.

your service.

your service.

your service.



## ONBOARDING Process

Now that a lead has agreed to become a paying client, what do you want them to do next? I will always recommend sending a proposal with a contract and invoice, but after they pay, what next?

This is where you should consider the housekeeping and homework assignments your clients may need. Do you need general information from them before getting started or information about their business or ideas for their website or brand photography session? Do you have meetings you want them to schedule and attend? This is where you list it out for them to follow.

If your service has a "project date" or "project start date," these onboarding processes should include everything before those dates. If your service just starts as soon as they pay, you include everything here as well.

Write your onboarding processes for your three services in the spaces below. It's okay if they are all different or exactly the same!

### SERVICE 1:

Write your ONBOARDING process for your service:

### SERVICE 2:

Write your ONBOARDING process for your service:

### SERVICE 3:

Write your ONBOARDING process for your service:

### SERVICE 4:

Write your ONBOARDING process for your service:



## IN-PROGRESS Process

This section won't be used for everyone. This is for you if you have a project start and end date. The "In-Process" process is what happens between those dates.

Is this where you create a brand strategy for them and send it to them to review? Is this the time that you have your 4-8 coaching calls or different consulting meetings? Do you send them a website page or branding suite to review and provide feedback?

Whatever happens in the services that you stated in your service descriptions, list them here!

Write your in-progress processes for your three services in the spaces below. It's okay if they are all different or exactly the same!

### SERVICE 1:

Write your IN-PROGRESS process for your service:

### SERVICE 2:

Write your IN-PROGRESS process for your service:

### SERVICE 3:

Write your IN-PROGRESS process for your service:

### SERVICE 4:

Write your IN-PROGRESS process for your service:

## OFF-BOARDING Process

This section should be the easy part. The service is over and complete, and now you are delivering everything with a bow tied to it. I always recommend this is where you ask for feedback for the service you provided. However, do you need to do more than that to complete your project or service?



Do you need to send the final files or images? Are you having a review, offboarding, delivery, or training call? Do you want to check in on your clients in two weeks, one month, three months, six months, or more?

However you want to finish your time with your client, list it here.

Write your offboarding processes for your three services in the spaces below. It's okay if they are all different or exactly the same!

**SERVICE 1:**

Write your OFF-BOARDING  
process for your service:

**SERVICE 2:**

Write your OFF-BOARDING  
process for your service:

**SERVICE 3:**

Write your OFF-BOARDING  
process for your service:

**SERVICE 4:**

Write your OFF-BOARDING  
process for your service:

**THANK YOU FOR FILLING OUT THIS FORM.**

I will email you if I have any additional questions.

Save Draft

Submit

