Use this step-by-step roadmap to shape up your process and level up your business!

01 | PACKAGES + PRICING

This first step is foundational to your process and will help you clearly show your clients how you can help. Doing this (and nailing your client intake process in step 3) is going to eliminate project scope and all of those "surprise" tasks that always seem to pop up once a project starts.

Action step: Go through the last 3-10 websites you've designed and write down EVERY LAST DETAIL of what you did to launch those sites. Group common tasks + services together to form your base packages and clearly define if anything should be treated as an add-on or a la carte option.

Think about how much time it will take you (on average) to build out a website using each of these packages, then price accordingly (do this for your add-ons, too). When coming up with pricing I recommend thinking about your time and the value you're bringing to your clients. Read my favorite book on value-based pricing here (it's a quick read and will change your life)!

Some ideas to get you going: *Did you set up their newsletter automation or create an opt-in? Did you connect the domain or set up professional email? Did you perform any copywriting or photography services (including gathering stock photos)? Did you perform SEO or analytics services? How many pages did you build for each site, and are there any special pages or features to note (commerce, membership area, etc)? Did you help with migrating blog posts?*

IMPORTANT: If you know of any service that you never, ever, ever want to do for clients - record that in your notes and don't budge if you get a request for that service or task down the road!

02 | SET UP YOUR PROJECT CALENDAR

An important part of running your business and giving your **best** to each project is to not overbook yourself, which we've all been guilty of doing! This will be super easy to do since you already took the time to outline your services and determine how long each package and add-on will take you to complete.

Action step: Using your favorite calendar (I love Google calendar), map out your project slots for each month for an entire year. A physical calendar/planner is fine but I prefer digital since projects can shift around from time to time!

When mapping this out, **think about all of your other duties** (things like marketing, admin, being a functioning human being) and how many projects you can realistically handle at one time. And definitely don't forget to build buffer room between your projects!

03 | SET UP YOUR LEAD FUNNEL

I know the word "funnel" kinda sucks, but this step is huuuuuge because it's the most precarious time in a designer/client relationship! Meaning, this is the first REAL time someone is choosing to interact with your business in a deeper way, so you need to make an amazing impression, ensure you both want the same things and that you're a good match for each other (why does this sound like dating advice all of a sudden??) 😜

Here's the exact journey my leads take between their initial interaction and booking a project:

SERVICE GUIDE *(using info from step 1)* → **INTAKE QUESTIONNAIRE** → **SCHEDULE FREE DISCOVERY CALL** → **DISCOVERY CALL** *(this is where I go over the questionnaire, talk about my process, answer questions + give a rough estimate)* → **PROPOSAL** → **INVOICE** → **CONTRACT** → **PARTY!!**

Action step #1: The first thing to do is simply establish what your funnel will be. Clearly define each step of the funnel like I've done above (feel free to swipe mine for yourself!).

Action step #2: Next you'll want to outline all the documents you'll need (a service guide, intake questionnaire, contract, etc). For now, just write a simple outline so you have a general idea of what info should be included in each document.

PSSST! *I like to offer a general estimate on the phone because I found I was wasting SO MANY HOURS each month preparing proposals for leads who weren't financially ready to book. Discussing estimates over the phone might be uncomfortable at first, but it gives you a great opportunity to discuss payment plans or adapt your services to reflect what your lead can afford. It's better to put yourself through a little discomfort rather than let your lead get cold and ghost you after the proposal....TRUST!*

04 | SET UP TEMPLATES FOR EVERYTHING YOU CAN!

I know they aren't the sexiest thing, but templates are still kinda fun if you think about how much extra time and energy you'll have to pour into your projects and clients after setting them up. DO NOT SKIP THIS STEP!

Action step: Take the outlines you wrote in step 3 and fully flesh each item out. Focus on one template at a time then move onto the next.

05 | SET UP YOUR TECH

Good tech systems will help you automate and streamline your business, meaning your workflows will run easier, your projects will be more successful and your clients will have a better experience working with you!

05 | TECH CONTINUED....

Action step: The first tech you'll want to set up is for invoicing and contracts. If you accept payments online you'll need to set up a payment processor (I love Stripe) then sign up for bookkeeping software and potentially a contract delivery service. I love using Dubsado* to manage my proposals, invoices + contracts. I also recommend setting up a project management system (like Asana*, Freedcamp, Basecamp or ClickUp) so you can help your clients work through each stage of the project (you can set up tasks with due dates and auto reminders!).

Check out this post for a complete overview of the tools I use regularly in my business (there are some discount codes for client management and bookkeeping apps) and this post I wrote all about setting up + delivering your client contracts!

**Affiliate link - This means I may earn a commission (at no additional cost to you) if you click through this link and make a purchase.*

06 | REFINE YOUR PREP PHASE

The prep phase is all about incorporating intentional time into your process to ensure your projects are primed for success. During this phase you'll do things like hand out client homework, hold a strategy meeting, gather content for the project, map out site goals, brainstorm design ideas for each page and collect important info from your client like their domain + social media log-ins.

Action step: Look back at your last 3-5 websites and write out ALL the steps you took to prep for those projects, big and small. Did you send your client any homework to fill out? Did you hop on a strategy call? Did you prep folders, files or a project management tool? What else did you do to plan or prep before starting the actual design phase? Write all of this down so it's clearly defined, then consider creating a "Project Prep" task list in your project management tool.

07 | REFINE HOW YOU PRESENT CONCEPTS + COLLECT FEEDBACK

This step will look a lot different from designer to designer. Are you doing a live buildout of your client's site, or will you present static mock-ups then move to the build out phase? Whatever you do, you'll most likely be presenting it to your client then collecting feedback.

Action step: You can refine this stage by outlining the best way that works for you to present your work to clients. Is it in-person? A video chat with screenshare? Do you record a demo then send it with an outline of your thoughts? Whatever your process, write down each step then consider creating a "feedback prompt" template that lists all the questions you'd normally ask when gathering feedback. (PS - you can totally add each step of this phase into your project management tool, too!)

08 | REFINE YOUR LAUNCH + WRAP UP PHASES

Okay. Now you've gotten final approval! But then you're all, "NOW I'VE GOTTA TIE UP HOW MANY MORE LOOSE ENDS BEFORE THIS THING WRAPS UP??" I feel you. It's a drag. So, just like some of our previous steps, it's time to come up with a simple + systematic way to tidy things up and get this website LAUNCHED (and get paid).

Action step: List out every step that happens between your client's final approval and hitting launch. Do you test out all links and forms for a final check? Do you perform any SEO services, set up Google Analytics or help your client direct their domain or set up professional email? Do you normally get final payment before hitting launch (please tell me that you do!)?

After listing each of those tasks, write out anything that needs to happen to tie it all up with a bow. Is there anything you need to tell your client in a goodbye email, and can you write out a template for it? Do you offer website training or a support service like website maintenance or ongoing SEO + analytics reports? Include every little detail in your list and be sure to add it to your project management tool, too.

TIE IT TOGETHER: Now that you've got all the steps outlined for your project (what you just did for your prep, presentation, feedback, launch + wrap up phases), you can create a clear "process overview" for your clients in your service guide! Take all the **major milestones** and list them in order so your clients can get a general overview of how their project will go. This is a very simple way to manage expectations for your projects and show your clients just how organized you are! You can also put this on your website.

09 | GET IN THE RIGHT MINDSET

Now that you've gotten the process laid out….here's what's going to help your business grow more than ANYTHING else. It's as simple as believing that you're actually capable of making that growth happen.

Let me be real with you. There aren't a lot of things any of us really have a lot of control over....but how we choose to think, behave and respond are definitely things we can all control. Believe me when I say how important this is in stabilizing your business and helping you step into the best designer, business owner and human you can possibly be!

Action step: If you haven't already, get REALLY clear on your goals and why you're in business. How is what you're doing making an impact in the world? Once you get clear on your value, you'll realize your business is less about you and more about who you're serving. This also helps you adopt the powerhouse mentality needed to position yourself as an expert to your clients! If you daydream about hearing, "Do whatever you think is best, I totally trust you" coming out of your clients' mouths, know that this step is where you start!

10 | CREATE AN EXPERIENCE THAT CULTIVATES RELATIONSHIPS

Client relationships are something I'm super passionate about. After establishing my business full time in 2016 I promptly made it my mission to ensure my relationships with clients felt just like my relationships in real life.

I solely did this because I wanted work to feel less like work (and probably because I'm completely incapable of taking myself too seriously). What I wasn't expecting was to have my clients become some of the most important relationships I have with *anyone* in my life. These relationships fill me up and make me feel all warm and fuzzy inside...but they also keep my business stable without doing any extra work.

Action step: For this step, try to brainstorm a few ways you can let clients know you care about them, like really care about them. These do NOT need to be magnificent gestures. In fact, something smaller that you can do consistently is going to be best. Things like making sure your clients know (because you told them) that you value their input during the feedback process. Or making sure they know you care about them reaching their business goals during the discovery call. Or maybe even showing just a little more patience than you'd normally show if a client slips up on a due date or missed payment (without being a doormat...there is a line). After you brainstorm (seriously, think of 5-10 easy ways to show you're there to support your clients), IMPLEMENT ONE OF THEM IMMEDIATELY! Might I suggest starting with a touch-in to past clients just to see how their business is going?

My hope is that after working through this roadmap, you feel more confident in your systems and processes so that it's easier to focus on your clients and projects (and have more fun with design)! Email me at hello@mybilliedesigns.com if you get hung up on anything or have any questions - I'm here for you!