

Client Process Playbook

A professional workflow for copywriters & strategists

This document is designed to help freelancers and marketing strategists manage clients professionally, improve communication, organize deliverables, and create a premium client experience from the first message to final delivery.

1. Lead Qualification

- Understand the client niche, goals, budget, and urgency.
- Identify whether the client is serious or just exploring.
- Collect links, social accounts, website, and current marketing materials.
- Ask discovery questions before jumping into pricing.

2. Discovery Call

- Understand the business model and audience.
- Identify pain points and desired outcomes.
- Clarify KPIs and expectations.
- Listen more than you speak.

3. Strategy Phase

- Research competitors and market positioning.
- Analyze customer psychology and objections.
- Build messaging direction and funnel structure.
- Create content pillars and campaign angles.

4. Proposal & Offer

- Present the solution clearly.
- Focus on outcomes instead of deliverables only.
- Break down timelines and revisions.

- Include payment terms and scope boundaries.

5. Onboarding

- Send contract and invoice.
- Collect brand assets and access.
- Organize everything inside Notion or Drive.
- Set communication rules and timelines.

6. Execution Workflow

- Research deeply before writing.
- Start with hooks and messaging direction.
- Write first drafts quickly, then optimize.
- Review every piece from a conversion perspective.

7. Review & Feedback

- Ask for specific feedback.
- Avoid vague revisions.
- Document changes and final approvals.
- Keep communication professional and calm.

8. Delivery

- Deliver files in organized folders.
- Add implementation notes when needed.
- Make the client experience smooth and premium.
- Always overdeliver slightly.

9. Retention & Upselling

- Follow up after project completion.
- Suggest next logical services.
- Turn one-time clients into long-term partnerships.

- Track testimonials and results.

Stage	Main Goal
Lead Qualification	Filter & understand the client
Discovery	Understand business deeply
Strategy	Create positioning & direction
Execution	Produce high-quality deliverables
Delivery	Professional final experience
Retention	Build long-term client value

Professional systems create premium positioning. The more organized your process is, the easier it becomes to attract better clients, increase pricing, and scale sustainably.