
COURSE

Client Onboarding for Freelance Designers

A practical written course for preparing your next client project

Genesize

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About this product

This manually authored educational sample illustrates a Genesize course: three modules, six written lessons and a final onboarding-package project. It uses the fictional Maple Lane Bakery identity project. The sample is not an AI-generation benchmark, client case study or promise of business results.

Define the project before designing

Identify the agreed deliverables and gather the information needed for kickoff.

Write a brief that sets boundaries

Separate confirmed deliverables, assumptions and open questions in a one-page project brief.

Learning objective

Write a one-page brief that distinguishes the agreed deliverables from assumptions and unanswered questions.

Lesson

A project brief is a shared reference for the work you have agreed to do. Start with the client's purpose, intended audience and required deliverables. Then record constraints such as existing brand elements, available assets and target dates. Keep confirmed information separate from assumptions. If the client has not approved a decision, label it as an open question rather than treating it as settled.

Describe deliverables concretely. 'A new visual identity' leaves room for different interpretations; 'one logo direction, two agreed revision rounds and specified final file formats' gives both parties something to discuss. The brief should reflect the actual agreement. It does not replace a contract, and a draft should be reviewed with the client before work begins.

Worked example

Fictional example: Maple Lane Bakery requests a logo refresh. The brief lists a primary logo and a one-color version. A packaging redesign is recorded as outside the current scope. Whether the existing wheat symbol must remain is an open question for kickoff.

Action steps

1. Write the client's purpose in one sentence.
2. List each agreed deliverable and its format.
3. Record constraints and dependencies.
4. Put unresolved decisions in an open-questions list.
5. Send the draft for review before treating it as the project baseline.

Practice

Draft a brief for the fictional bakery project. Check that a reader can identify what is included, what is excluded and which decisions still require an answer. Remove any promise that was not part of the agreement.

Key takeaway

Clear boundaries begin with specific deliverables. Next, collect the inputs needed to confirm the brief and prepare for kickoff.

Collect the right client inputs

Create a focused intake request that identifies required assets, answers and owners.

Learning objective

Create an intake request that identifies the answers, assets and responsible people needed before kickoff.

Lesson

An intake request should collect information you will actually use. Begin with the open questions in your brief, then ask for the assets necessary to start. Group the request into a few clear categories: business context, audience, existing materials and practical constraints. For each requested asset, explain the preferred format and where the client should place it.

Ask focused questions rather than a long list of vague preferences. 'Which customers should this identity feel relevant to?' supports a design decision more clearly than 'What style do you like?' Give the client a way to say they are unsure. Assign an owner and an agreed date to missing items. If an asset is essential, explain that the affected work cannot begin until it arrives; do not silently make up the missing information.

Worked example

For Maple Lane Bakery, request the current vector logo, examples of existing packaging and a description of the customers the shop wants to reach. The owner will provide the logo file; the shop manager will gather packaging photos. The symbol decision stays on the kickoff agenda.

Action steps

1. Turn each open question into a focused intake question.
2. List the files needed for the first design task.
3. Specify formats and a shared upload location.
4. Agree on an owner and date for each missing item.
5. Flag dependencies before setting the production schedule.

Practice

Write an intake message with no more than five questions and three asset requests. Explain why each item is needed. Check that the client knows where to respond and can identify which missing items would block the next step.

Key takeaway

Collect inputs to support decisions, not to make a form look thorough. Use the answers to prepare a kickoff with a clear purpose.

Run a useful kickoff

Turn project inputs into a shared plan with clear decisions and review responsibilities.

Build a decision-focused kickoff agenda

Prepare a kickoff agenda that resolves open questions and records next steps.

Learning objective

Prepare a kickoff agenda that confirms the brief, resolves open questions and assigns the next actions.

Lesson

A kickoff meeting should leave the project easier to act on. Share a short agenda in

advance so the client can prepare. Start by confirming the purpose and deliverables, then address decisions that affect the first stage of work. Keep background discussion separate from decisions that need agreement. If a question cannot be resolved during the meeting, assign a person to answer it and an agreed follow-up date.

Record the decisions as you go. A useful note states what was agreed, who is responsible and what happens next. At the end, read back the important decisions and check for different interpretations. Send a written summary afterward. Do not describe a silence or missed meeting as approval unless that process was expressly agreed and is appropriate to the project.

Worked example

The bakery kickoff agenda covers the wheat symbol, the first concept presentation and the final file requirements. The client decides to explore a simplified symbol. Packaging dimensions remain unresolved, so the manager is assigned to confirm whether they affect the logo applications.

Action steps

1. Share the brief and agenda before the meeting.
2. Confirm the purpose and deliverables.
3. Discuss the open decisions that affect the next stage.
4. Record decisions, owners and dates.
5. Read back the summary and send it after the meeting.

Practice

Prepare a five-item kickoff agenda for the bakery. For each item, write the decision or information you need by the end. Then create a decision log with columns for topic, agreement, owner and next action.

Key takeaway

An agenda is useful when it leads to decisions and responsibilities. The next lesson defines how design feedback will become an approval.

Agree on feedback and approval

Define who provides feedback, who approves work and how conflicting requests are handled.

Learning objective

Document the feedback channel, review participants and final approver for each agreed stage of design work.

Lesson

Feedback and approval are different jobs. Several people may contribute observations, but the project needs a clear way to decide which instructions to follow. Ask the client to name the person who consolidates feedback and the person who can approve the work. These may be the same person. Agree on a channel that keeps comments attached to the correct version.

Give reviewers useful prompts: which requirement does the design meet, which does it miss, and what needs clarification? Encourage consolidated feedback instead of separate conflicting messages. Record the agreed revision process and review dates. When requests conflict, ask the client to resolve the priority before revising. Keep approval records alongside the relevant version so later work does not rely on an ambiguous conversation.

Worked example

Maple Lane Bakery's manager gathers comments from staff, while the owner approves the final direction. Feedback will arrive in one shared document labelled 'Concept review — version 1'. If staff preferences conflict, the manager and owner will consolidate a single set of instructions.

Action steps

1. Identify the feedback coordinator and final approver.
2. Agree on one review channel.
3. Label the design version under review.
4. Request one consolidated response.
5. Record the approval or unresolved decisions before moving to the next stage.

Practice

Write a review plan for the bakery with a named fictional role for coordination and approval. Add the review channel, expected response date and a process for conflicting comments. Check that the plan never treats general feedback as final approval.

Key takeaway

A clear approval path makes the next step identifiable. Keep that path visible in the project-start packet you prepare next.

Move from kickoff to production

Organize the project handoff and document how changes to the agreed work will be considered.

Send a practical project-start packet

Assemble an accessible project-start packet with the current brief, timeline and responsibilities.

Learning objective

Assemble a concise project-start packet that links the current brief, schedule, inputs and review responsibilities.

Lesson

Your project-start packet should let someone find the next step without searching through the whole conversation. Use one summary page to link the current brief, approved assets, decision log and review plan. Include the next milestone, its dependencies and the people responsible. Label documents with a version or date so the current agreement is easy to identify.

Check access before sending the packet. A folder link is not helpful if the client cannot open it, and sensitive files should only be available to the intended participants. Keep the timeline honest: distinguish agreed dates from dates that depend on missing inputs. Send a short message explaining what the client should review now. Invite corrections to the summary before you begin the affected work.

Worked example

The bakery's summary links Brief v2, the approved logo files, the kickoff decision log and the review plan. It names the concept presentation as the next milestone and flags the missing packaging dimensions. The designer tests that the owner can open each shared link.

Action steps

1. Gather the current versions in one shared location.
2. Write a summary with the next milestone and dependencies.
3. Link the brief, assets, decisions and review plan.
4. Check permissions and document labels.

5. Send a short review request identifying the client's next action.

Practice

Create a project-start summary using descriptive placeholder links for the bakery documents. Ask a peer to identify the next milestone, its owner and any blocking dependency using only that page. Revise any wording that requires explanation.

Key takeaway

A useful packet makes the current agreement and next action easy to find. Keep it current when a new request changes the work.

Respond to changes without guessing

Compare a new request with the agreed brief and document its possible effect before proceeding.

Learning objective

Compare a new client request with the agreed brief and document questions about scope, timing and price before acting.

Lesson

A new request is information to assess before it becomes work. Compare it with the current brief: is it a clarification, a revision already included, or a different deliverable? When the answer is unclear, ask what the client needs and why. Do not assume that every request is included, but do not label it an extra charge without checking the agreement either.

Document the possible effect on deliverables, dependencies and schedule. If additional work or a different price is proposed, explain it and obtain the appropriate agreement before proceeding. The process should reflect your actual contract and circumstances. Update the brief and project-start summary after a change is approved. Keep the original versions available so the reason for the change remains understandable.

Worked example

The bakery asks for a takeaway-cup design after the logo kickoff. The current brief lists logo files only, so the designer asks about cup sizes, supplier requirements and timing. A proposed separate deliverable is discussed before any packaging design begins; no price or approval is presumed.

Action steps

1. Record the new request in the client's words.

2. Compare it with the current scope and revision agreement.
3. Ask for missing requirements.
4. Explain any proposed effect on work, schedule or price.
5. Obtain the needed agreement and update the project documents.

Practice

Draft a short response to the bakery's cup-design request. Acknowledge it, explain what the current brief includes and ask two questions needed to assess the change. Avoid promising a date or quoting an unsupported fee.

Key takeaway

Assess a change against the agreement before acting. Your final project brings these steps together into one consistent onboarding packet.

Your complete onboarding packet

Apply the lessons to a fictional project and check the packet for unanswered questions.

Prepare a client-ready kickoff packet

Produce a brief, intake request, kickoff agenda, approval plan and project-start summary for one example project.

Learning objective

Produce a coherent onboarding packet for the fictional bakery project and check its scope, dependencies and approval process.

Lesson

Use the fictional Maple Lane Bakery identity project to assemble a complete onboarding packet. The bakery needs a primary logo and a one-color version. Its existing wheat symbol needs discussion, the manager gathers feedback and the owner approves the work. The packaging redesign is outside the initial brief. Treat dates, revision terms and file requirements as decisions to be agreed, not facts you can invent.

Your deliverable is one summary page linked to a project brief, intake request, kickoff agenda, decision log and review plan. Keep names and scope consistent across the packet. Include the next action and identify unresolved inputs. Add a short change-request response for the proposed cup design. Before presenting the packet, read it from the client's perspective: can they find what they need to do and understand what has not been

agreed?

Worked example

A consistent packet lists the same two logo deliverables everywhere. The intake request asks for existing vector files. The agenda resolves the symbol decision. The review plan distinguishes the manager's feedback role from the owner's approval role, and the summary flags any remaining dependency.

Action steps

1. Draft the brief and mark open questions.
2. Write the intake request.
3. Create the kickoff agenda and decision log.
4. Document review and approval roles.
5. Assemble and check the summary links.
6. Write the change-request response.
7. Review all documents for inconsistent scope, dates and assumptions.

Practice

Assessment rubric: Scope — the two agreed deliverables and excluded work are clear. Inputs — essential assets and missing answers have owners. Decisions — the agenda and log identify unresolved questions. Approval — feedback and approval responsibilities differ where needed. Usability — a reader can find the next action and current documents. Change handling — the cup request is assessed before new work is promised.

Troubleshooting: if two documents disagree, return to the brief and record which decision remains open. If a dependency has no owner, assign one before treating the timeline as ready. If a link cannot be opened, correct its permissions rather than emailing sensitive files broadly.

Key takeaway

Your packet is complete when it consistently explains the agreed work, necessary inputs, next actions and approval path. Review and adapt this educational example to each real project.