DEFINING GOALS

The Defining Goals Phase is your chance to get as much information from the client as possible. Details you need to receive from your client Include:

- **What the client really needs/wants through goals, customer avatar**
- **Access to all necessary login information**
- **Definitive timelines with scheduled dates**

The steps for this phase look like this:

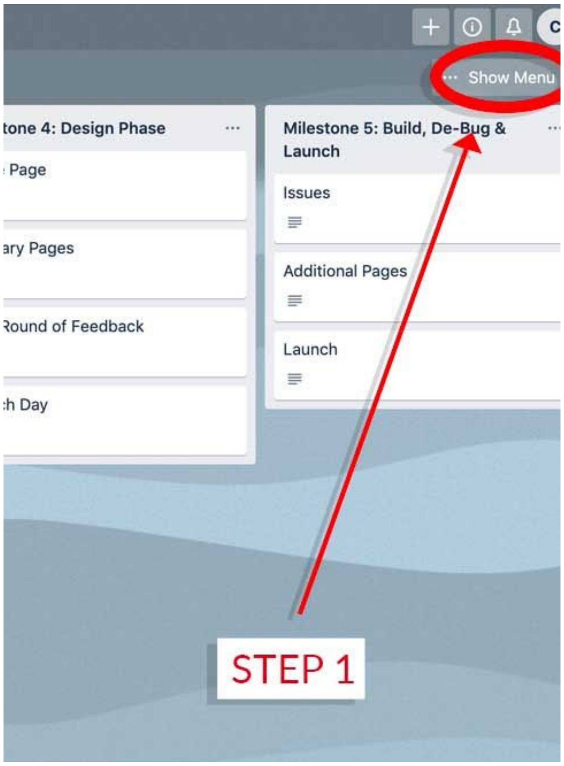
1. **TRELLO BOARD:** Introduce them to a Trello board or whatever project management tool you use
2. **QUESTIONNAIRE:** Have the client fill out another questionnaire that dives a little deeper into their needs for the project
3. **KICK-OFF CALL**
4. **SCHEDULE:** Schedule actual dates for tasks to be finished

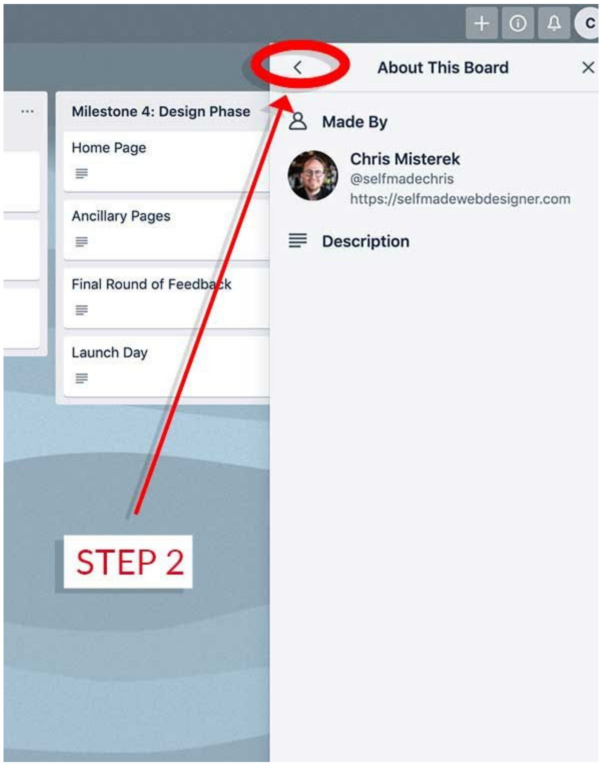
TRELLO BOARD

Clients usually need a kickoff call to keep from dragging their feet to get started. Schedule the kickoff call FIRST, and then ask them to sign up for their project Trello board and then fill out a pre-call questionnaire.

HOW TO SHARE A TRELLO BOARD

How to copy the Trello board to your own account (once you've signed up for your own free account):

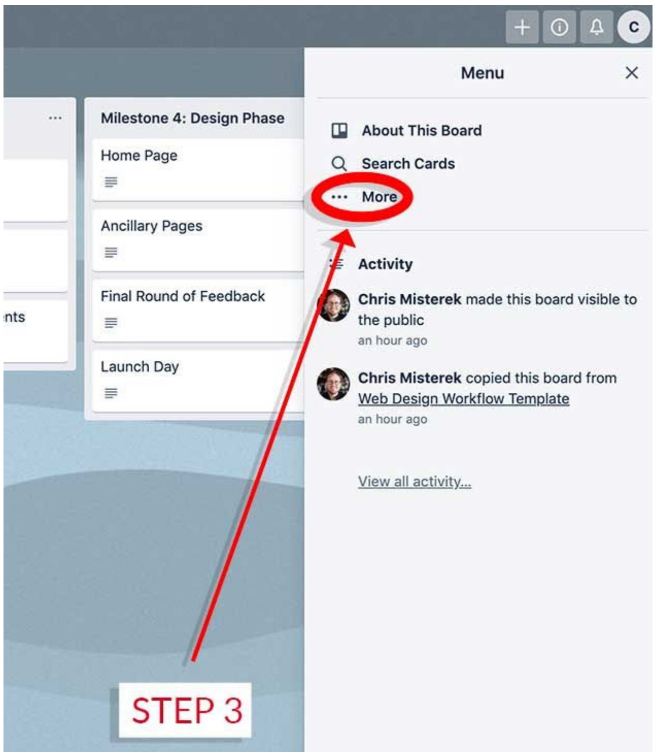


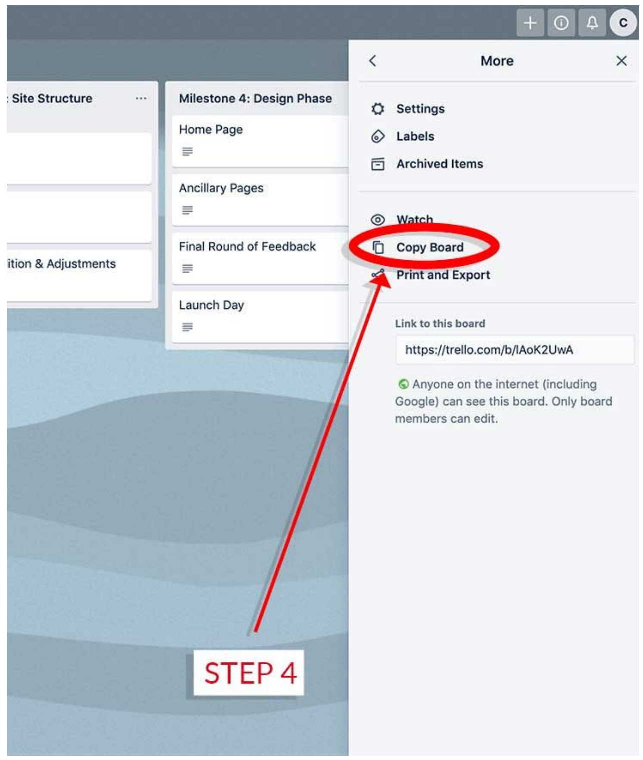


Click Menu In the top right-hand corner.

After That, you might see an "About This Board" slide out with my face on it. From there click the arrow left button.

HOW TO SHARE A TRELLO BOARD CONTD...





Then, you'll see the menu column. Click the three ellipses that have 'More' next to them

Finally, you'll see a link that says, "Copy This Board." Hit that and you're all set.

DEFINING GOALS

DO

LISTS & CARDS

The list is where we'll put our main sections of the project and the cards are the details of that list. Here are a few important notes about due dates and project credentials: the card isn't where due dates will live, it's just letting clients know that the board will have due dates and they'll be getting notifications. There are cards for both you AND your client. There are items they will need to add (like passwords, photos, or headshots), and there are things you will be working on that you can check off as you've progressed with the project-- this keeps lines of communication clear between you and the client.

KICKOFF CALL

- Clarify what they really mean regarding details in the questionnaire
- If something about their feedback or Ideas doesn't make sense to you... ask questions until they DO make sense.
- Record the call so you can go back and reference their responses

KICKOFF CALL OUTCOMES

Leave the call with the following outcomes:

- **Clearly defined and agreed-upon goals of the site**
- **A solid idea of their design preferences**
- **Clear ideas of the site's practicalities like pages, functionality, and tools being used**

AFTER THE CALL

After the call is over the fun really begins. You take all the info you got from the call and make a big game plan for getting things done AND communicating with the client. So, after the call, you want to make sure to:

1. Schedule deadlines
2. Schedule check-ins with the client

Deadlines can be flexible AND check-ins don't have to be on the phone or over zoom. They can be simple email check-ins. BUT, whatever you communicate to the client, make sure you stick to.