PLANNING & HANDOFF

What to send before a project kicks off

Gather the information your designer needs to make good decisions early.

FOR SMALL BUSINESS OWNERS

PLAN THE WORK

Start with one brief your team can agree on

Write a few sentences on what your business does, who it serves, and the action you want people to take. List your priority services, communities you serve, a target launch date, and what must be ready on day one. Identify a decision-maker and how feedback from other stakeholders will reach them.

Gather the assets your designer can use

Provide your logo in a vector format if available, brand colors and fonts, original photos, service descriptions, testimonials you have permission to use, and any important policies. Collect files in one shared folder and label materials that are still drafts. Note any image usage restrictions.

Explain the customer workflow

Tell your designer where inquiries should go, which fields you need, and what customers should see after submitting. If the site needs booking, payments, or membership, show how that works today and name the team member who owns each system.

PUT IT INTO PRACTICE

Provide access through the right channels

List the domain registrar, hosting, current site, analytics, and integrations. Create named invitations with the minimum required access, or use an approved secure sharing method when an invitation is unavailable. Keep passwords and recovery codes out of email and shared folders.

Bring the history of the existing site

If this is a redesign, provide current URLs, top search pages, past campaigns, and anything customers regularly use. Tell the team which pages and business processes are critical so they can plan the migration and test them before launch.

WORKED EXAMPLE

Waterford contractor preparing a redesign

The owner sends a one-page brief, original project photos, three priority service pages, and the inbox that should receive quote requests. The office manager is the approver. The designer receives delegated access to the site and uses the existing service URLs as the start of the migration map.

PRINTABLE WORKSHEET

Your next steps

Assign each task and check it off when you verify it.

- [ ] **Share the project brief**
  Include audience, goal, services, locations, and launch priorities.
  OWNER / DUE _____

- [ ] **Deliver usable brand files**
  Add original photos, logo files, and usage permissions.
  OWNER / DUE _____

- [ ] **Map the customer journey**
  Specify inquiry, booking, or payment handling.
  OWNER / DUE _____

- [ ] **Invite access securely**
  Identify system owners and use named roles.
  OWNER / DUE _____

- [ ] **Confirm decision ownership**
  Assign an approver and agree on feedback timing.
  OWNER / DUE _____

FIRST ACTION _____