



Service Deliverable Process

This is a starter template for a service deliverable process. It's a static version of a more dynamic process that can be built and used in ProcessKit.

Edit this process and make it your own, and also put it to use in your repeatable projects:

[Sign up for a free trial of ProcessKit.](#)

Learn how to make your business more predictable with our free video course:

[Process Automation for Service Companies](#)

1 Set the project details

To kick off the project, save all of the project details and requirements in this project's Details tab.

Include:

- Which service package was purchased
- The primary contact name
- The primary contact email

Also save any special, non-standard requirements in the project description.

2 Tag the project for this client

Apply a tag to this project using the client's company name as the tag name. This will ensure we'll be able to filter our projects by client.

3 Request assets from the client

We'll need to gather key assets and information from the client, which we'll use to execute this project.

Use the following email template:

Hi ___CLIENT_NAME___,

In order for us to get started on ___PROJECT_NAME___, we'll need to gather a few things from.

Please reply to this email and provide the following:

1. Asset or info request #1
2. Asset or info request #2
3. Asset or info request #3
4. Asset or info request #4
5. Asset or info request #5

Once we have those, we'll be well on our way to delivering this service within just a few weeks.

Thanks!

___YOUR_NAME___

Editor's note: (coming soon) You can use ProcessKit's email template feature and/or ProcessKit's intake forms feature to fully integrate this assets gathering step into your production process.

4 Received assets from the client

This task is here to mark that the client has sent back all of the assets we've asked for. Once you've confirmed receipt of these, you can mark this task off.

Editor's note: You can use Zapier to have this task marked off automatically, or (coming soon) use ProcessKit's forms feature to fully integrate this step with ProcessKit.

5 Execute phase 1 of the project

Work on the first part of the project.

Include any notes along the way as comments here on this task (those comments will also be logged in the Activity for this Project).

6 Send the client an update

Send the client an update on this project's progress. You can use this template:

Hi ___CLIENT_NAME___,

We're making great progress on ___PROJECT_NAME___.

Here's what we've completed so far:

- Thing 1
- Thing 2

Next week, we're moving onto tackling the next parts, including:

- Thing 3
- Thing 4

Once those are all set, I'll send you the draft for you to review.

Thanks,

___YOUR_NAME___

Editor's note: You can use ProcessKit's email template feature to automatically prepare the above email and (optionally) automatically send it off to the client.

Execute phase 2 of the project

Work on the next part of the project.

Include any notes along the way as comments here on this task (those comments will also be logged in the Activity for this Project).

Request feedback and approval from the client

8

Request feedback and approval from the client

Now that the project is in a good place for the client to see, you can send it to them for their review and approval.

You can use this template email:

Hi ___CLIENT_NAME___,

The ___PROJECT_NAME___ is ready for you to review. This is still a work-in-progress, so we're open to any and all feedback you may have.

If you approve of this direction, then we will move onto putting the finishing touches.

Click here to review:

<https://examplelink.com/project-draft>

Thanks,

___YOUR_NAME___

Editor's note: You can use ProcessKit's email template feature to automatically prepare and (optionally) automatically send this email to the client. You can also use ProcessKit's forms feature to gather feedback or approval from the client and have that integrate directly with this process.

9

Received feedback & approval from client

This task is here to mark that the client has sent back their feedback and/or approval. Once you've confirmed receipt of these, you can mark this task off.

Editor's note: You can use Zapier to have this task marked off automatically, or (coming soon) use ProcessKit's forms feature to fully integrate this step with ProcessKit.

10 Execute change requests and finishing touches

Work on the final part of the project.

Include any notes along the way as comments here on this task (those comments will also be logged in the Activity for this Project).

11 Deliver the final work to the client

Now that you've made the necessary adjustments and finalizations to the project, you can send off the final deliverable to the client.

You can use this template email:

Hi ___CLIENT_NAME___,

Great news! Your ___PROJECT_DELIVERABLE___ is all finished.

You can access it here:

<https://examplelink.com/final-deliverable>

It was a pleasure working with you! We'll be back in touch shortly for the next project.

Thanks,

___YOUR_NAME___

Editor's note: You can use ProcessKit's email template feature to automatically prepare and (optionally) automatically send this email to the client.

Powered by

