

The 3-Step Client Process

A simple visual you can drop into a proposal, onboarding doc, or sales page to show clients exactly how working with you works.

1

Discover

A short intake call or form to understand the client's current setup, goals, and where things are breaking down. This is where scope gets defined and expectations get set before any work starts.

2

Deliver

The build phase — templates, systems, or deliverables get customized and put in place. Regular check-ins keep the client looped in so there are no surprises at handoff.

3

Delight

Final walkthrough, training, and handoff — plus a clear path for ongoing support if the client wants it. The goal is a client who can run the system without you in the room.

What's In the Template Library

A quick-reference grid of the template categories available in the full Business Growth Templates library — use this as a one-pager to show clients or prospects what's included.

Smartsheet Business Packs

Ready-to-use Smartsheet templates across Sales & CRM, Finance & Planning, Marketing & Growth, HR & Team Ops, Project Management, and Executive Dashboards & KPIs.

Notion Business Templates

Full Notion workspaces including the Consulting Agency Kit, Multi-Site Business OS, Course Creator Kit, Content Calendar Pro, and WooCommerce Store Manager.

Done-For-You Customization

For businesses that want a template set up and tailored to their exact workflow rather than self-serve — built out and handed off ready to use.