

**designer  
admin.**

# **Design Admin Roadmap**

Create the ultimate blueprint to automate  
your design business admin!



# Welcome to your Design Admin Roadmap!

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This worksheet will help you map out your design admin templates. With your design admin roadmapped, you can start setting up a customised template system and automate as much of your admin process as possible.

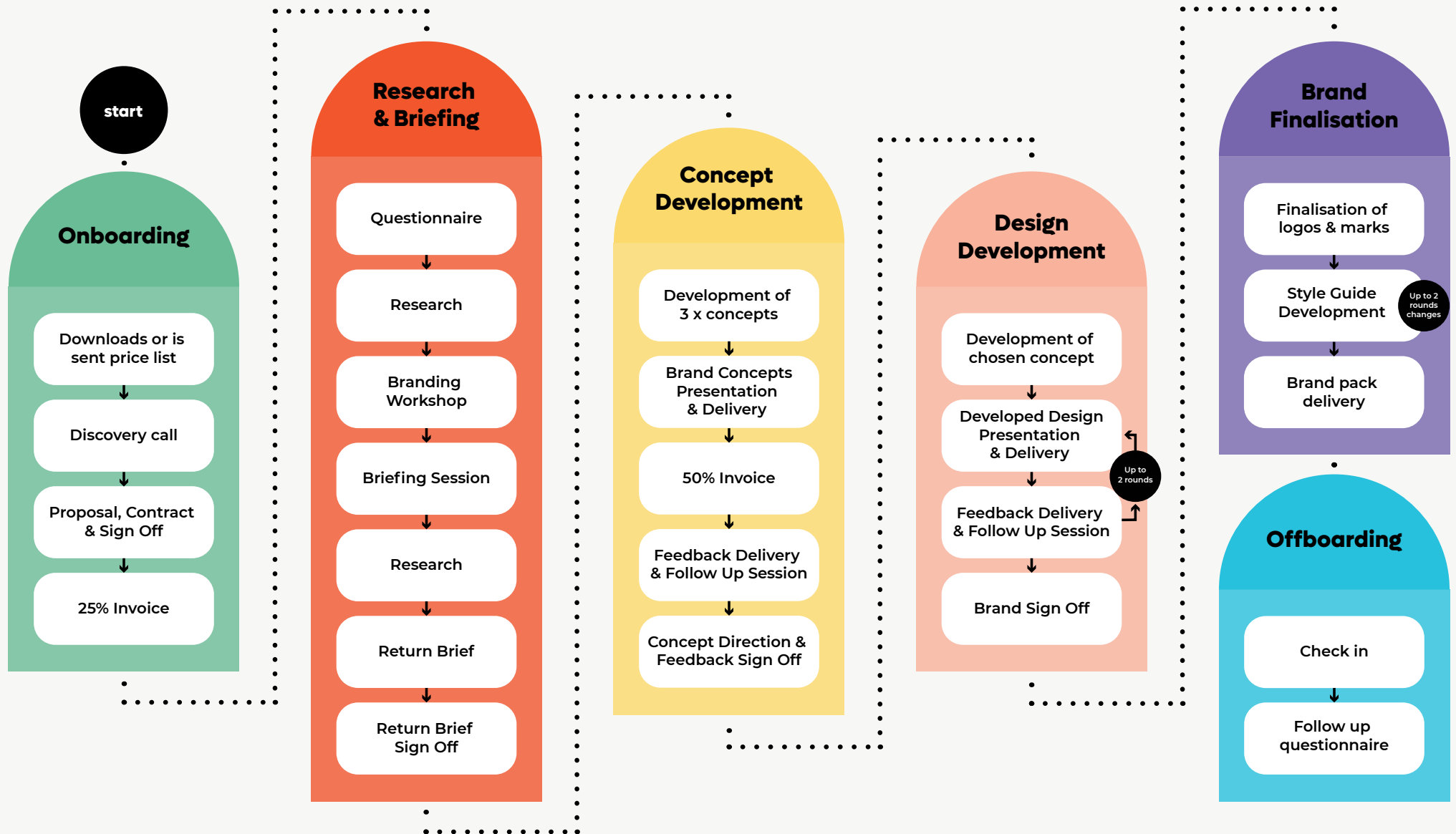
## **Having an established process will:**

- Allow you to stop focusing (or stressing) on the admin side of your business. Instead, you can use your brain power on the creative stuff you're actually good at.
- Help you guide your client through projects so they know exactly what to expect and when to expect it. Good project management is key to client happiness.
- Help take the emotion out of your decisions. If you have a template to deal with most project pain points, you won't overthink it, make special rules for each client or feel guilty when you stick to your guns.

Watch the accompanying video for a step by step walk through and start simplifying your design business admin today!

# My brand process

(psst... you can use this and the examples on the following pages as a cheat sheet to map out your process and customise as required!)



**project phase:** *Onboarding*

*Discovery Call Questions*

*Proposal Template + E*

*Follow up E*

*25% Invoice + E*

**project phase:** *Research & Briefing*

*Questionnaire + E*

*Follow up E*

*Branding Workshop Guidelines*

*Briefing Session Guidelines*

*Return Brief Template (2 x changes) + E*

*Follow up E*

*Return Brief Sign Off + E*

**project phase:** *Concept Development*

*Concept Notes Template*

*Concept Presentation Template + E*

*Follow up E*

*50% Invoice + E*

*Concept Development / Feedback Sign Off + E*

**project phase:** *Design Development*

*Developed Design Presentation (2 x changes) + E*

*Follow up E*

*Brand Sign Off + E*

**project phase:** *Brand Finalisation*

*Brand Guidelines / Brand Style Guide (2 x changes) + E*

*Brand filing system*

*25% Invoice + E*

**project phase:** *Offboarding*

*Check in E (2 weeks)*

*Follow up questionnaire + E (4 weeks)*

 **project phase:**

 **project phase:**

 **project phase:**

 **project phase:**

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