



# Welcome Packet

# Welcome!

I'm so happy you are here!

I'm so excited that you've chosen me to support you in your business and am grateful for the opportunity to help you. Your commitment and dedication to your goals is inspiring and I'll do my best to support you and make our work together easy, productive, and fun.

I'm eager to get started, and in the vein of ensuring ultimate success, I ask that you read this Welcome Packet so that we can begin on the same page about expectations, work flow, and ensure our work together is as efficient as possible.

With much gratitude,

A handwritten signature in orange ink that reads "Lyssa". The signature is written in a cursive, flowing style.

Let's Begin!

# Expectations

As your strategic partner, I'm ready to help you aim for success in your business. These expectations will ensure we hit the target, right out the gate.

Genuine and clear communication is vital to create a partnership across long distances. Staying in contact regularly will enhance our working relationship and help you achieve your goals more quickly. *Please note the hours and communication policies below so that we can make the most of our work together and create a positive, proactive workflow together.*

Here's what you can expect from me:

- 24hr response time on typical emails.
- 4hr response time on emergency emails.
- Weekly updates via email on project progress.
- My complete skill set and toolbox of experience.
- Clear and direct communication from me on all projects via email, Notion (project management platform), and Google Drive (online collaborative platform for file storage).
- An enjoyable free-flowing relationship where you feel my commitment to your success.
- Office hours and availability Monday through Thursday 9am to 5pm EST and Fridays 9am to 4pm EST.

And here's what I expect from you:

- ✓ To give 100% of your effort to our work together.
- ✓ To understand and be responsible for your business decisions as we outline big decisions via email for sign-off so that we're clear on goals and timelines.
- ✓ Communicate clearly and ask any questions as they arise

# Our Working Relationship

Please note that I'm an independent contractor. I have my own equipment. I pay my own taxes. I have my own business entity. I set my own hours and bill you for my services. Our working relationship is based on pre-agreed goals. I ask that you respect the fact that I do not work for you full-time and have other clients. Creating a mutually respectful relationship that acknowledges these boundaries and limitations will ensure a long and happy working arrangement. I'm devoted to my clients and their success and will do everything possible when emergencies arise, but please understand that poor planning on your part doesn't equate to an emergency on mine.

I will work on your projects throughout the month to reach the agreed upon goals. I do not, however, follow a strict client-based calendar (meaning there are not typical times that I reserve exclusively for your work). Rather, I schedule my time based on overall efficiency and effectiveness. If you would like to reserve a specific time each week to review your items, that can be arranged.

## Project Communication

In order to execute your action plans effectively, I rely on a few tools to help me stay organized, and effectively implement your scope of work. My favorite project communication tools that we may use are:

- **Email** - generally I am available to you by email and will respond within 24 hours to all requests.
  - If you need something in a certain time frame, I will do all that I can to help you get it done.
  - If you have something that is time sensitive, please get it to me as soon as you can. If you get it to me at the last minute, I may not be able to help you. In that case, I will tell you upfront so other arrangements can be made.

- **Google docs** - a web-based application in which documents and spreadsheets can be created, edited and stored online. All files, images and documents pertaining to your projects will be housed there.
- **Notion** – this collaboration tool will be our workspace. This platform will allow us to work seamlessly together and help you see where we are in the process of your project work. Notion also allows us to keep organized and on the same page at all times. We will be sharing your workspace with you during our onboarding process.

### **A special note for retainer clients...**

**Consult calls** will be done bi-monthly, where we will have a strategic planning call to review your progress. Once our call is over, a detailed email will be submitted, overviewing our action plan for execution. My consult call days are Mondays and Thursdays. I do this so that I can ensure that I have ample time to connect with you and support your projects while leaving my other workdays to concentrate on completing your projects.

# Hours & Communication

## Office Hours

Monday – Thursday 9am – 5pm EST

Friday 9am – 4pm EST

\*Weekends are for my family.

\*\*Closed on all major holidays.

## In Case of Emergencies

Typically, I try to avoid work into the evenings or on weekends. However, if agreed upon upfront, I can be available on weekday evenings between 7:00 pm - 10:00 pm EST or Sundays between 10:00 am and 2:00 pm at 1 ½ X my hourly rate. I do not work at all on Saturdays, as I am Seventh-Day Adventist and do not work on the Sabbath.

## Contact info

I am available to you through the following communication channels:

Email: [lysa@freshtakeproductions.com](mailto:lysa@freshtakeproductions.com)  
[lysagreer@gmail.com](mailto:lysagreer@gmail.com) (used for Google Drive)

Phone: 724-603-5774

## Payment

Payment is due upfront. Our work will commence once payment is received and our contract has been signed.

*For retainer clients* - You will receive a monthly time report on the last day of the month. This will outline the work that has been completed within that time frame, based on the number of hours purchased. You also can see the overview of this time in your Project Task Tracker, inside Google Drive.

# My Process

Good communication is the key to an efficient experience, and I work hard to provide the best possible experience for each client. Though each project is unique and I take everyone on with a fresh eye, there is a similar process for I do with each.

## **Initial Strategy Consultation**

During our consult calls, we will discuss your big-picture goals, outline first projects, and determine areas that need immediate attention. After our initial call, I will set up your project in Notion, Google Drive folders, and email you an initial action plan, outlining our first projects.

## **Meeting the team**

In order to efficiently execute your projects, it is important that we know what each member of your team will be responsible for. I will create your team roles and responsibilities document, as well as your team contact sheet. This will be shared with all members of your team so we can communicate smoothly.

## **Overall Action Plan**

Based on your overall goals, this document will outline all your projects (dream big here!) and will be broken down into actionable goals with benchmarks. Each goal will be broken down into tasks that will then be translated into Notion for execution.

## **Evaluations**

As we progress, we will have assessments, evaluating how things are going both with projects and with the team. During these calls, we will review timelines on projects, insure issues are addressed, and conduct an evaluation of my work so that I can continue giving the support you need most.