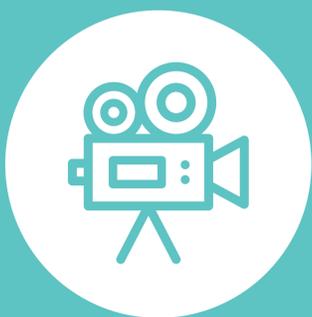


# The content onboarding roadmap

## Kickoff and setup

Onboarding a new account is serious business. It's when you map out your future projects and start building relationships with key stakeholders. While you're roadmapping future projects, make it a point to tackle these creative tasks too.

By taking these on now, you'll start delivering value before you deliver your first project and you'll keep your clients engaged and excited instead of losing momentum while they wait for the first deliverable.



### B-Roll Day

Start out by scheduling a day to come to your client's office and shoot visuals to build a b-roll library. This isn't just a useful way to get a jump on your first project, it's an asset you and your client can use over time. It's a good way to reinforce that you're a long term partner and you have your client's back.



### Graphics package

While you're doing your strategic onboarding, getting ahead of the game by building a graphics package is a smart idea. Again, these resources will be used a lot over time and by tackling this now you'll be able to reduce your post-production timelines as you start your first projects.

Things we always create upfront: lower thirds, logo builds, titles and callouts.



### Hiring a VO artist

Not every video needs voiceover, but the process of auditioning and selecting the right artist can take some time. Working with a single artist or even a small group can help align you and your client on the brand's style and tone.

Build those relationships now to get a head start and prevent you and your client from getting overloaded with decisions later on when time is tight.



### Auditioning music

Just like with VO, pulling music during onboarding will help you and your client lock in on the brand's style. It can take awhile to find the right tracks, so it makes sense to start early.

For larger clients, consider working with a composer to build a customized music library... It's less expensive than you might think, and you can get stems (musical building blocks) to help customize tracks to fit your video.

A relationship with a composer also gives you the option of having custom mixes and arrangements for high value content.

## Delivery and next steps

Build a simple timeline doc or spreadsheet that contains links to content and important milestones so you and your client has all the information they need in one place.

Also, consider adding regular check-ins and meetings to make sure everyone stays in the loop and aware of progress. We like to have weekly emails or calls for simple status updates and monthly retrospectives to cover things in more depth.

Starting these things now will help educate your clients on how you like to work and set them up for success later on when projects are in flight and things are moving fast.