



LET'S GET READY TO SELL  
**PROJECT SCOPING**

# LESSON PLAN

Understanding Your Customer  
Professional Discovery  
Preparing Presentations  
The Pre-Scope Process  
Templates Overview

*Industry tested processes and  
templates that have been used by  
digital agencies around the world from  
Freelancers to 8-Figure\* Agencies.*

\*YES! **8-Figures** is not a typo.





WHERE IT ALL BEGINS  
**UNDERSTANDING**  
Your Customers

# WHO IS THE CUSTOMER?

## *1 What are their goals?*

What are they really looking for and why?

## *2 What have they tried?*

What have they tried already? Why do “they” feel it didn’t work? What’s the 1 thing they hated about that experience?

## *3 Who is their ICP?*

Knowing the customer’s customer is critical to not only communication and sales but it’s important that you understand you’re actually working for their customer, not them. They are not the customer.

## *4 Who are the competitors?*

We have to understand the market and the players!

## *5 Who are the providers?*

Knowing who providers products and services to a marketing is paramount to being able to fully understand the competition and later on build some authority. This could be the start of a NICHE!

## **5.1 How do they like to communicate?**

*There is nothing worse than the texting client who messages you at 7PM with “did you get my email?”*

*This isn’t just about setting boundaries. It’s about working a process.*

*Nothing will take a project off the rails faster than a client who pulls you in different directions and will not follow instructions.*

*Create options. Never assume they will login to your “dashboard” - odds are, they won’t.*

The background features a minimalist design with a white top half and a dark gray bottom half. In the bottom-left corner, there is a large, solid teal triangle pointing upwards and to the right. Above and to the right of this triangle, there is a smaller, solid black triangle pointing upwards and to the left. The two triangles overlap.

# PROFESSIONAL DISCOVERY

**SUCCESS IS DETERMINED  
BEFORE YOU STARTS**



# 4 RULES

## ***1 We confirm and track everything***

Have a system to track client confirmations that is easy to point back to if they go off the rails.

## ***2 We stick to our process***

Whether it's email or portals. If you say "this is how we work" then that's how you work. Hold your ground.

## ***3 We clarify... everything!***

Communication is key. Ask deeper questions and make sure everyone is 100% clear so you can keep the project moving.

## ***4 We are not afraid to re-negotiate***

What are they going to do? Fire you mid project. Probably not. But, it's all in how you say it. People don't like to be backed into a corner, so give them options.

# DISCOVERY PROCESS



## DISCOVERY PROCESS & DOCUMENTATION

[Client Name | Date]

### DISCOVERY #1 - Kick Off

Acme Inc.	www.website.com	John Doe	PH: 555-555-5555
Project Name	TIMELINE: 1-2 Months	BUDGET: \$000000	DATE: 1.01.2018

#### Consultation phase

The consultancy phase is where we come to understand your organisation better and a strategic direction can be established. In the kick-off meeting we will need to collect a variety of information that will inform how we approach your project.

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#### Business objectives

What does your organisation wish to achieve from this project?

- This list of objectives will need prioritising so that they can be used to inform the decision making process.

# DISCOVERY TEMPLATE

Remember, this is for the customer too!

The background features a large, solid black triangle pointing upwards. Overlaid on the bottom-left corner of this triangle is a solid orange triangle pointing upwards. The rest of the background is a light beige color.

# THE PRE-SCOPE PROCESS

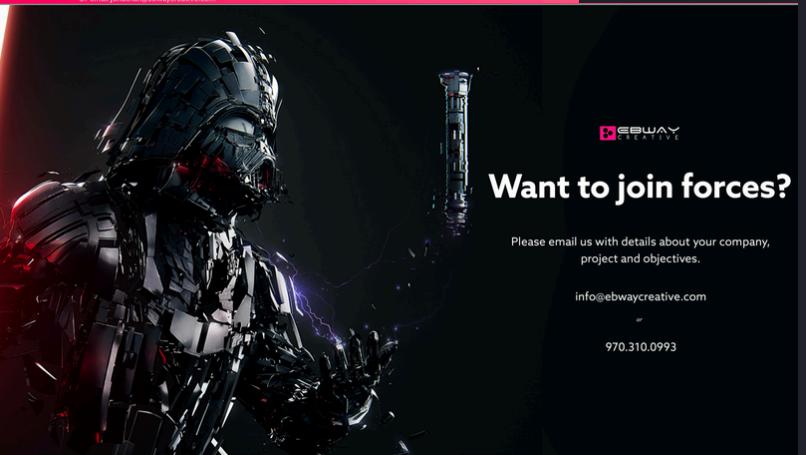


HOW YOU START  
**MATTERS**

# CAPABILITIES PLAYBOOK



We hand craft amazing websites, online stores and digital marketing campaigns that help



Want to join forces?

Please email us with details about your company, project and objectives.

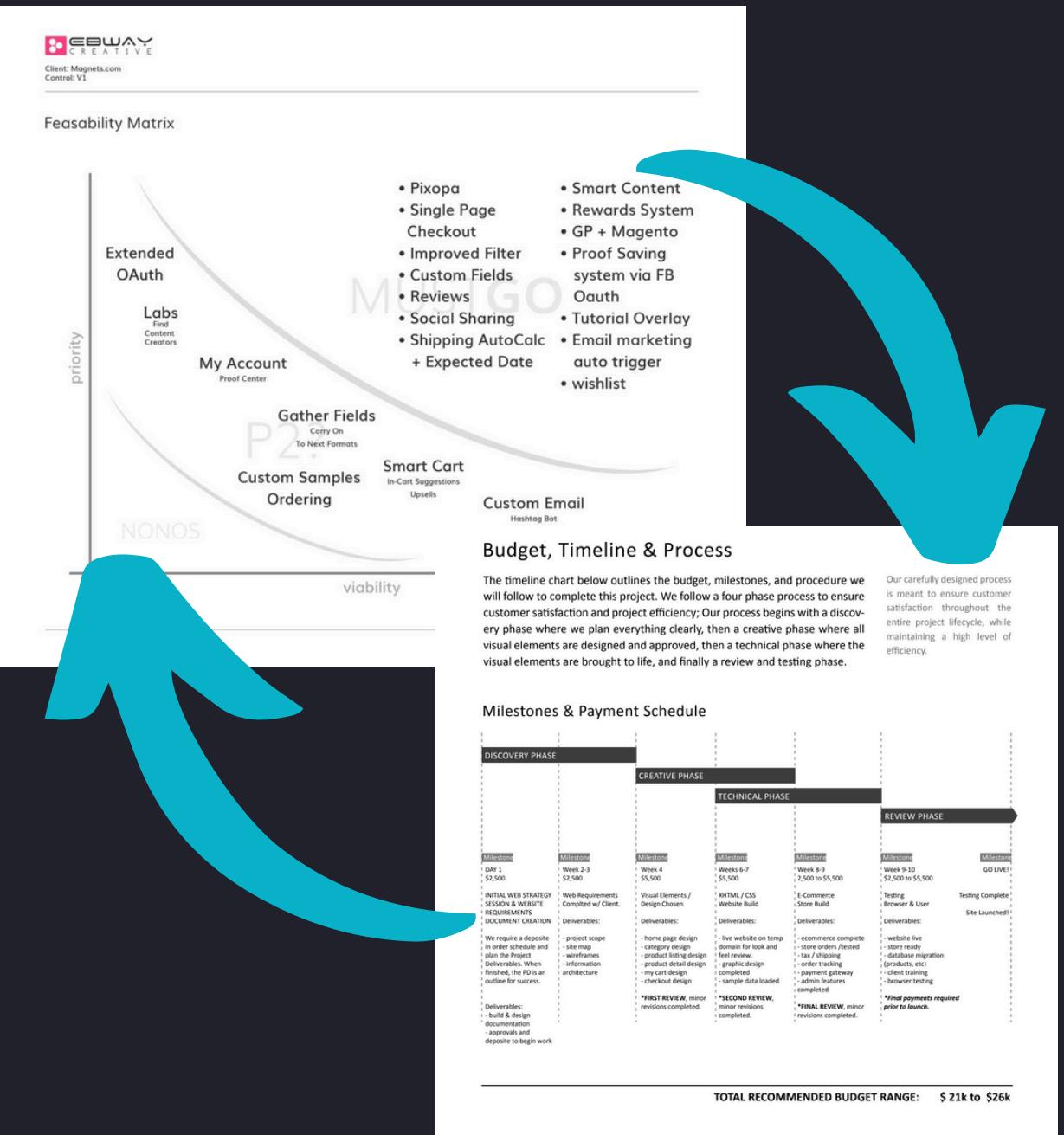
[info@ebwaycreative.com](mailto:info@ebwaycreative.com)

970.310.0993



# THE MAGIC TEMPLATES **PRE-SCOPE PROCESS**

# HOW THIS WORKS



# TEMPLATE WORKFLOW

Remember, it's a back and forth!

A dark, atmospheric landscape featuring a road that curves away into the distance. The sky is filled with heavy, textured clouds. In the background, a range of mountains is visible, with some peaks showing signs of snow or ice. The overall mood is mysterious and contemplative.

**GET STARTED**  
TIME TO TAKE ACTION