
CLIENT WELCOME PACKET

Welcome aboard, *Copper Kettle.*

Everything you need for the next 12 weeks: who we are, how we work, what we need from you, and what happens when. Keep it close. Most answers are in here.

CLIENT

Copper Kettle Bakery

PROJECT

Brand refresh +
website

TIMELINE

Weeks 1 – 12

YOUR CONTACT

Theo Banks

01 · HELLO

A welcome letter

Dear June and Sam,

Thank you for choosing Fieldnote Studio. We are very happy to work with you.

Copper Kettle has something many brands spend years trying to fake: real people, real bread, and a queue out the door every Saturday. Our job is to make your brand and your website feel as warm as your shop does at 7 am.

This packet explains how the next 12 weeks will work. It tells you who does what, when we need things from you, how we share work and collect feedback, and when invoices are due. Nothing in here is a surprise. It all matches the proposal you signed, in plain words.

Please read it before our kickoff call in Week 1. It takes about 15 minutes. If anything is unclear, that is our fault, not yours. Tell Theo and we will fix it.

We cannot wait to get started.

Lena Marsh

Founder and Creative Director, Fieldnote Studio

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Our three promises to you

No surprises.

You always know what we are working on, what is next, and what it costs.

Plain answers.

We explain design choices in normal words, and we tell you when we think you are wrong.

On time.

If a date has to move, you hear it from us first, in writing, with a reason.

02 · THE ESSENTIALS

Project at a glance

12	5	6	\$24,000
weeks from kickoff to launch	phases, each with a review	website pages, built and live	fixed fee, in 3 payments

Client	Copper Kettle Bakery, two shops and a wholesale kitchen
Goal	Look as good as the bread tastes. Grow online pre-orders and wholesale enquiries.
Success looks like	Online pre-orders go up by 30% within three months of launch. Wholesale enquiries come through a form, not Instagram messages.
Kickoff	Week 1, Tuesday, 10:00 – 11:30, at your Main Street shop
Launch	Week 12, Wednesday (a quiet weekday, so we can watch it closely)
Decision maker	June Whitaker gives final approval on every phase

What we will deliver

- Brand strategy summary (2 pages)
- Primary logo, a short wordmark and a round stamp mark
- Colour palette and type system
- Packaging label and bag stamp designs
- Brand guidelines PDF (about 20 pages)
- 6-page website: Home, Menu, Order, Wholesale, About, Visit
- Online pre-order setup with your current shop system
- Wholesale enquiry form that sends to your inbox
- Two 30-minute training sessions for your team
- 30 days of free fixes after launch

Not in this project

Photography, copywriting for more than the six pages, printed menus, signage, and paid ads. We are happy to quote for any of these. See "Change requests" on page 8.

03 · THE PEOPLE

Who is who

A small team works on your project from start to finish. Theo is your main contact. If you are not sure who to ask, ask Theo.



Theo Banks
PROJECT MANAGER · YOUR MAIN CONTACT

Runs the schedule, books meetings, sends recaps and invoices.

theo@example.com · (503) 555-0142



Lena Marsh
FOUNDER · CREATIVE DIRECTOR

Leads strategy and signs off all creative before you see it.

lena@example.com · (503) 555-0140



Ama Osei
BRAND DESIGNER

Designs your logo, palette, packaging and brand guidelines.

ama@example.com · (503) 555-0147



Rui Tanaka
WEB DESIGNER AND DEVELOPER

Designs and builds the website, pre-orders and forms.

rui@example.com · (503) 555-0153

Your side of the table

NAME	ROLE ON THIS PROJECT	CONTACT
June Whitaker	Owner. Final approval at the end of each phase.	june@example.com (503) 555-0161
Sam Ortiz	Marketing lead. Day-to-day contact, collects team feedback.	sam@example.com (503) 555-0168
Dee Carver	Wholesale manager. Input on the wholesale page and form.	dee@example.com (503) 555-0175

04 · THE PLAN

Process and timeline

We work in five phases. Each phase ends with a review and your written sign-off. We only start the next phase after sign-off, so nothing gets built on a shaky base.



WEEKS	PHASE	WHAT HAPPENS	YOU SIGN OFF ON
1 – 2	Discover	Kickoff, shop visit, customer survey, look at competitors.	Brand strategy summary
3 – 5	Brand identity	Two logo routes, then one route refined into a full system.	Logo, colours, type, packaging
6 – 8	Website design	Page map, then full designs for all six pages on desktop and mobile.	Final page designs
9 – 11	Build	We build the site, connect pre-orders and the form, and test on real phones.	Site on the test link
12	Launch	Go live, team training, handover of all files and logins.	Launch checklist

Dates depend on sign-off. Each phase review needs your answer within 3 working days. If a sign-off is late, the launch date moves by the same number of days. Theo will always tell you the new date in writing.

05 · HOMEWORK

What we need from you

Please upload everything to the shared "From Copper Kettle" folder. Tick each item when it is in. If something does not exist yet, tell Theo. That is fine, we will plan around it.

BEFORE KICKOFF

- | | | |
|--------------------------|---|--------|
| ☐ | Signed proposal and the 40% deposit
Work starts when both are in. | Week 0 |
| ☐ | Completed brand questionnaire
About 30 minutes. The link is in your welcome email. | Week 0 |
| ☐ | Current logo files and any old brand material
Even the things you dislike. They tell us what to avoid. | Week 0 |

FOR THE BRAND PHASE

- | | | |
|--------------------------|--|--------|
| ☐ | Names and emails of 10 regular customers for a short survey
Only with their permission. We send one email, no follow-ups. | Week 1 |
| ☐ | Photos of your shops, labels, bags and boxes as they are today
Phone photos are fine. | Week 1 |
| ☐ | Label sizes and printer specs from your packaging supplier
So the new labels print right the first time. | Week 3 |

FOR THE WEBSITE PHASE

- | | | |
|--------------------------|--|--------|
| ☐ | Full menu with prices, allergens and order cut-off times
A spreadsheet is best. We will send a template. | Week 5 |
| ☐ | Your text for the About and Wholesale pages
Rough notes are fine. We edit them into shape. | Week 6 |
| ☐ | Product and shop photos, at least 20, in high resolution
Photography is not in scope. See the FAQ if you need a photographer. | Week 7 |
| ☐ | Admin access to your domain, hosting and shop system
Use the password manager invite. Never send passwords by email. | Week 8 |

10 items in total. Theo sends a friendly reminder 3 working days before each due date.

06 · STAYING IN TOUCH

How we communicate

We keep conversations in a few clear places, so nothing gets lost. Here is where each kind of message goes and how fast you can expect an answer.

CHANNEL	USE IT FOR	WE REPLY WITHIN
Shared Slack channel	Quick questions, files, day-to-day updates	4 working hours
Email to Theo	Approvals, invoices, anything formal	1 working day
Review links	Feedback on designs, pinned to the exact spot	Read at the next check-in
Phone	Urgent issues only, such as the live site being down after launch	2 hours, 9 am – 5 pm

Meetings

- ✓ **Kickoff:** 90 minutes, Week 1, at your shop.
- ✓ **Weekly check-in:** 30 minutes on video, every Thursday at 9:30 am.
- ✓ **Phase reviews:** 60 minutes, at the end of Weeks 2, 5, 8 and 11.
- ✓ **Launch day call:** 30 minutes in Week 12.
- ✓ Theo sends a written recap within 24 hours of every meeting.

Our working hours

- ✓ Monday to Friday, 9 am to 5 pm Pacific time.
- ✓ We do not reply on weekends or public holidays.
- ✓ We know Saturday is your busiest day, so we never book reviews on a Friday afternoon.
- ✓ The studio closes for one week in late December. Theo will confirm the dates.

One voice, please

Please send feedback through **one person on your side, Sam**. Sam collects comments from June, Dee and the team, and sends one combined set. Mixed messages from five people are the main reason projects slow down.

07 · YOUR INPUT

Feedback and revisions

Your feedback shapes the work. To keep the project on time and on budget, each deliverable has a set number of revision rounds. A round is one combined set of feedback from you, and one updated version from us.

DELIVERABLE	ROUNDS INCLUDED	YOU REPLY WITHIN	WE SEND THE UPDATE WITHIN
Brand strategy summary	1	3 working days	2 working days
Logo routes (pick one of two)	2	3 working days	3 working days
Full brand system	2	3 working days	3 working days
Website page designs	2	3 working days	4 working days
Built site (fixes on the test link)	1	3 working days	3 working days
Total rounds	8		

Feedback that helps

- ✓ Say what is not working and why: "This feels too formal for our regulars."
- ✓ Point to the spot. Use comments on the review link.
- ✓ Tell us what you like too, so we keep it.
- ✓ Mark each comment as "must change" or "nice to have".

Feedback that slows us down

- "Make it pop." We will ask what you mean, which costs a day.
- Comments sent in many places: Slack, email and text.
- New ideas from someone who has not seen the earlier rounds.
- Feedback after sign-off on an earlier phase.

Change requests

Sometimes you will want something that is not in the plan, like a seventh page or a holiday gift box label. That is normal. Theo will write a short change request with the cost and any effect on the timeline. We do not start the extra work until you approve it in writing. Extra rounds of revision are billed the same way, at **\$120 per hour**, and we always quote first.

08 · THE MONEY PART

Payments and terms

The project has a fixed fee of **\$24,000**. You pay it in three parts, tied to clear milestones, so you always pay for progress you can see.

40% · \$9,600		30% · \$7,200	30% · \$7,200
PAYMENT	WHEN WE INVOICE	SHARE	AMOUNT
1 · Deposit	When you sign the proposal (Week 0)	40%	\$9,600
2 · Brand sign-off	When you approve the brand system (end of Week 5)	30%	\$7,200
3 · Launch	When the site goes live (Week 12)	30%	\$7,200
Total		100%	\$24,000

Terms in short

Due date

Invoices are due within 14 days. You can pay by bank transfer or card.

Late payment

If a payment is more than 14 days late, we pause work until it is paid. The launch date moves by the same amount of time.

Running costs

Domain, hosting and shop system fees are billed to you directly by those companies. They are not part of our fee.

Extra work

Approved change requests are invoiced with the next milestone payment.

Ownership

You own all final designs and code once the last payment is made. We may show the work in our portfolio after launch.

Ending early

Either side can end the project with 14 days' written notice. You pay for the work done up to that date.

This page is a plain-language summary to help you plan. It is not legal advice. The signed agreement is the document that applies.

09 · LOGINS

Tools and access

You will get invites to these tools in the week before kickoff. All of them are free for you. You do not need to install anything except the Slack app, and even that is optional.

TALK

Slack

A shared channel called #copper-kettle for quick questions and updates.

TRACK

Project board

Shows every task, who owns it and when it is due. Updated by Theo each Monday.

REVIEW

Review links

Click on any part of a design to leave a comment exactly where it applies.

SHARE

Shared drive

Two folders: "From Copper Kettle" for your uploads, "From Fieldnote" for ours.

PROTECT

Password manager

A shared vault for logins. You can remove our access at any time.

MEET

Video calls

Calendar invites include the video link. No account needed.

Access we will ask for

SYSTEM	ACCESS LEVEL	WHY WE NEED IT	NEEDED BY
Domain registrar	Manage DNS only	Point copperkettle.example.com at the new site	Week 8
Hosting	Admin	Set up the new site and its backups	Week 8
Shop system	Staff account, no payouts	Connect online pre-orders to your menu	Week 8
Analytics	Editor	Measure pre-orders before and after launch	Week 9

At handover in Week 12, we give you a list of every login, then remove our own access within 30 days, once the free-fix period ends.

10 · GOOD QUESTIONS

Frequently asked questions

What if we do not like either logo route?

It is rare, but it happens. We go back to the strategy and find what we missed. One fresh pair of routes is included once. After that, we would talk about a change request.

Can we add pages to the website later?

Yes. The site is built so your team can add pages with the same layouts. We show you how in the training sessions. We can also build them for you after launch.

Do you write the words for the website?

We write headlines and short page text for the six pages. We edit your notes for the About and Wholesale pages. Longer copy, like a blog, is not included.

We need photos. Can you help?

Photography is not in scope, but we can recommend two local food photographers. A half-day shoot usually costs between \$800 and \$1,500. Book it for Week 6 at the latest.

What happens if something breaks after launch?

For 30 days after launch, we fix any bug in our work for free. After that, you can call us when you need us at \$120 per hour, or choose a monthly care plan.

Can June skip the weekly check-ins?

Yes. Sam can attend for Copper Kettle. We only need June at the kickoff and the four phase reviews, because she gives final sign-off.

What if we need to pause the project?

Tell Theo as early as you can. We can pause for up to four weeks without extra cost. The schedule moves by the length of the pause, plus up to one week to restart.

11 · LET'S GO

Your next steps

Four small things, and we are ready for kickoff.

01

Pay the deposit

THIS WEEK

Invoice 1 for \$9,600 is in your inbox. Work starts when it is paid.

02

Fill in the brand questionnaire

BEFORE WEEK 1

About 30 minutes. Answer as yourself, not as a marketer.

03

Accept your tool invites

BEFORE WEEK 1

Slack, the project board, the shared drive and the password manager.

04

Save the kickoff date

WEEK 1

Week 1, Tuesday, 10:00 – 11:30, at your Main Street shop. We bring the coffee.

Questions before kickoff? *Ask Theo.*

theo@example.com · (503) 555-0142 · Monday to Friday, 9 am – 5 pm

