

Client Onboarding & Brief

Photography & Videography

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Builds a client onboarding and brief process — capturing all shoot details (events, timings, locations, family/VIP list, must-have shots, style preferences), contract and advance, and a shared plan — so shoots run smoothly and expectations are aligned. Use it to onboard a booked client. For consultation use the Client Consultation & Expectation Setting tool.

Purpose of this tool & output

Start every project aligned and organised

How the output is used

Use it to start every project aligned and organised — a client onboarding and brief that sets expectations from day one.

Important cautions

A detailed brief (must-have shots, family/VIP list, schedule) prevents the missed-moment and confused-timing problems that ruin wedding coverage; confirm everything again just before the event, and have the signed contract and advance in place.

Companion documents

- Booking & Enquiry Management
- Client Consultation & Expectation Setting
- CRM & Follow-Up System
- Client Communication Plan
- Cancellation & Rescheduling Policy
- Referral & Testimonial Capture

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.