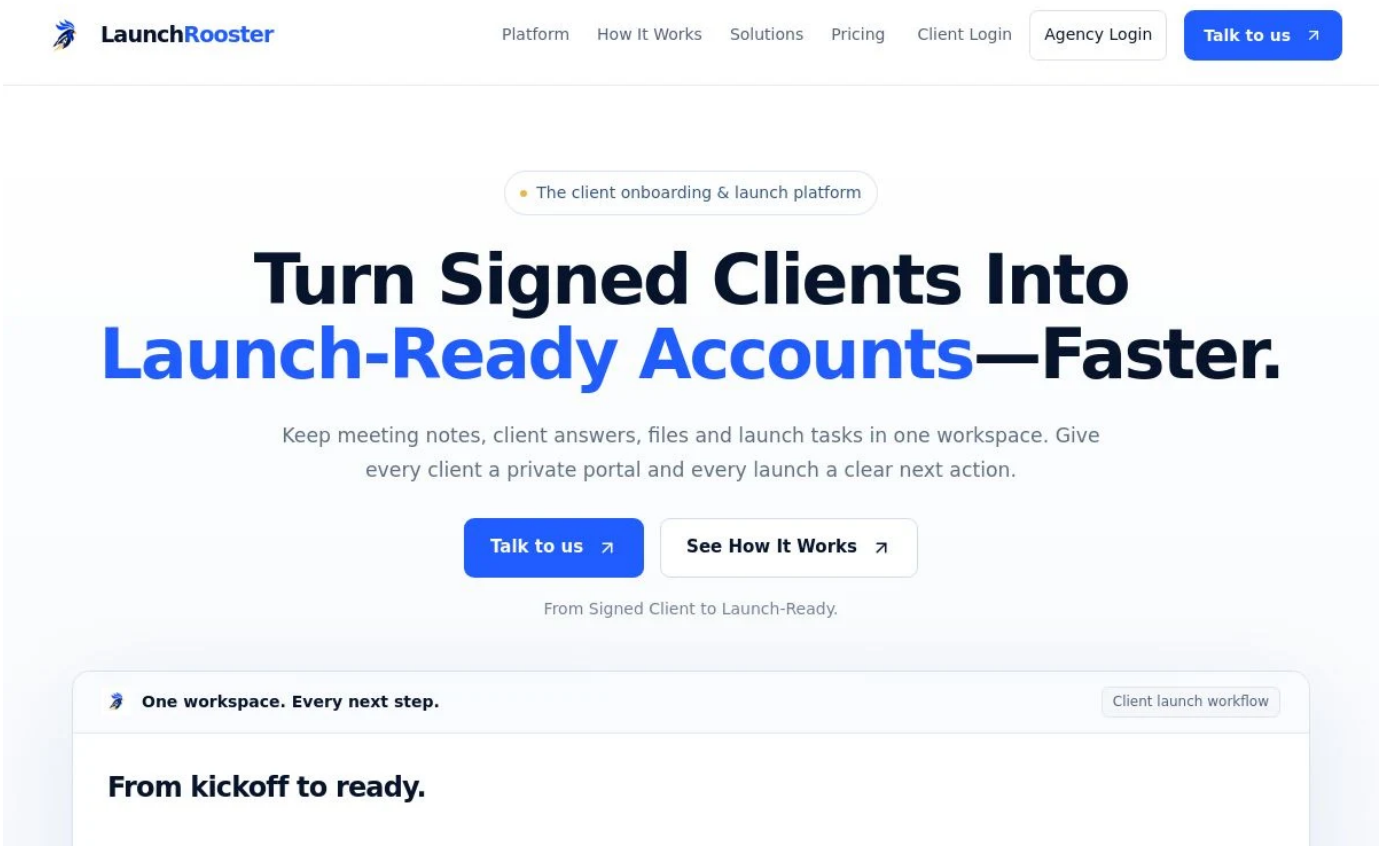
SELECTED WORK 06 / CLIENT ONBOARDING & OPERATIONS

Launch Rooster

Get new clients organized before the work starts.

Launch Rooster addresses the handoff after a client agrees to work with an agency. The platform combines intake, client invitations, assets, messages, briefs, approvals, and launch tasks. It shows how a defined onboarding process can become a shared workspace for clients and the delivery team.

LAUNCHROOSTER.COM



THE BUSINESS NEED

A client says yes, then your team spends days chasing files, answers, and approvals.

What MEFH built

Make the information, decisions, and responsibilities required for a new engagement visible in one organized process.

01 Website & inquiry capture

The public website and inquiry capture introduce the offering and save interest for agency review. This establishes the first handoff into a working process. A saved inquiry is not the same as a signed agreement, approved scope, or paid invoice; those milestones need their own confirmation.

02 Client onboarding portal

The client onboarding portal uses guided intake and client-specific invitations to collect information. It gives clients a defined place to contribute rather than a loose sequence of requests. A useful implementation makes required inputs, optional context, and the next expected action understandable.

03 Agency dashboard

The agency dashboard brings client records, missing inputs, and onboarding progress into view. Its operational purpose is to show where a project needs attention. A progress indicator reflects the underlying checklist, so the team still needs to decide whether completed information is good enough to use.

04 Asset vault & messages

The asset vault and messages keep files and client conversations near the project, while private agency notes serve internal work. That separation helps organize collaboration. In an adaptation, file expectations, naming, ownership, and what clients can see should be agreed before the process is rolled out.

05 Marketing briefs & approvals

Editable marketing briefs support review, approval, and change-request states. This turns a collection of client answers into a working direction that can be discussed. An approved brief should be identifiable as an actual decision, with later changes handled deliberately rather than silently replacing the original understanding.

06 Launch tasks & readiness

Launch tasks and readiness views organize assigned work, status, and missing items. They provide a practical checklist for coordinating delivery. Readiness is a view of recorded completion; it does not by itself certify an external integration, authorize publication, or prove a campaign is producing results.

From client interest to an organized kickoff

Illustrative use of the delivered features; this is not a record of an individual customer transaction.

01

Clarify the engagement

The agency reviews the inquiry and agrees on scope, responsibilities, and commercial terms outside the mere submission of a form. The onboarding process begins from an actual working agreement.

02

Invite the client

The client receives access to the appropriate onboarding workspace and supplies the requested business context. Clear prompts help the client understand what is needed and why.

03

Collect the working material

Assets and conversations are organized with the client record. The delivery team can identify missing inputs instead of relying on memory or a search through several unrelated threads.

04

Review the brief

The team turns the intake into a marketing brief, requests review, and tracks approval or requested changes. This creates a more explicit transition from information gathering to a shared direction.

05

Resolve readiness gaps

Assigned tasks and missing items guide the next actions. Before execution, the agency checks the actual accounts, assets, approvals, and connections needed for the agreed work.

THE TRANSFERABLE IDEA

A clear onboarding workspace helps turn a new engagement into usable information, explicit decisions, and assigned work.

The work behind the experience

An inquiry leads to a reviewed client engagement. Invited clients provide intake and assets. The agency develops a brief, records approval decisions, and coordinates launch tasks through the shared workspace.

Intake ownership

Assign someone to review new information, resolve incomplete answers, and decide when intake is ready for use. The client may complete a field without providing enough detail, so quality review is a human responsibility.

Assets and approvals

Define which materials are required and who may approve the brief. Keep internal notes distinct from shared conversations. If direction changes, record the request and its effect on scope, deadlines, or required inputs.

Delivery coordination

Use tasks and readiness to drive a regular review of missing items. Confirm external systems individually and keep commercial milestones separate from operational progress. No client should be assumed paid or ready solely because an onboarding checklist is complete.

SUGGESTED OWNERSHIP

Client decision-maker

Business inputs, assets, and approvals

Account owner

Intake quality and communication

Delivery owner

Task completion and readiness review

WHY THE DESIGN WORKS THIS WAY

Make the client's job clear

Onboarding works better when the client knows what to provide, where to provide it, and what happens next.

Keep decisions visible

Brief approval and change requests should be identifiable states rather than assumptions buried in a message.

Treat readiness as a checklist

Completion indicators help coordinate work but do not replace the final checks required to launch a service.

What to measure

Suggested measures, not reported results. Establish a baseline, verify the available data, and agree on targets before evaluating performance.

MEASURE	DEFINITION	EVIDENCE NEEDED	WHY IT MATTERS
Intake completion	Required inputs completed for each engagement	Onboarding records	Find the information clients need help supplying.
Time to usable intake	Elapsed time from invitation to reviewed intake	Invitation and review timestamps where available	Separate client submission from agency acceptance.
Approval cycle	Review requests and time to a recorded brief decision	Brief states and decision history	Identify unclear briefs or missing decision-makers.
Readiness gaps	Outstanding required items by owner	Tasks and readiness records	Focus the next review on the work blocking delivery.
Rework reasons	Change requests grouped by their cause	Brief feedback and project notes	Improve intake and scoping without blaming all changes on execution.

ACCEPTANCE CHECKS FOR A SIMILAR PROJECT

- ✓ Invite a labeled test client to the appropriate workspace.
- ✓ Upload and retrieve a sample project asset.
- ✓ Check readiness against actual missing inputs and connections.
- ✓ Confirm the client sees only the intended shared information.
- ✓ Exercise brief approval and a change-request path.

Could this work for your business?

WHERE IT FITS

This pattern suits service businesses whose delivery is delayed by scattered answers, files, and approvals. It works best when the organization can define a repeatable intake and identify who is responsible for client decisions and internal execution.

A USEFUL FIRST SCOPE

Map one repeatable service, define its required inputs, and create a clear client invitation and intake flow. Add a shared asset area, a brief approval process, and a short readiness checklist. Connect additional systems only when they have a defined purpose and an owner.

QUESTIONS TO BRING TO A CONVERSATION

- Which missing inputs most often delay the first milestone?
- Who has authority to approve the brief?
- What should clients see and what should remain internal?
- Which systems must be verified before work can launch?

PROJECT SCOPE NOTES

- Readiness tracks checklist completion. External CRM, email, SMS, and calendar connections require configuration and verification.
- Payment and invoicing capabilities are outside the delivered scope described here; the case study makes no claims about live payment processing or automatic collection.
- No onboarding-time reduction, staffing savings, or client-retention result is asserted without recorded evidence.

POSSIBLE ADAPTATIONS

Agency

Client intake, assets, briefs, and approvals

Consultant

Discovery information and agreed direction

Creative service

Production inputs and launch responsibilities

Discuss something like this for your business

View the project **Read the case study online**

Project snapshot: November 3, 2026. Based on project-source review and the published MEFH case-study content. Workflows and evaluation plans are illustrative; no measured business results are asserted.