Tāhuna Consulting Client Intake Process

From first enquiry to work beginning

Most small service businesses handle enquiries informally — responding when they remember, scoping on the fly, and onboarding inconsistently. The result is miscommunication, scope creep, and clients who arrive at kickoff confused about what happens next.

This document maps Tāhuna Consulting's client intake process from the moment an enquiry arrives to the moment work begins — giving the team a consistent, repeatable process that works the same way every time regardless of who is handling it.

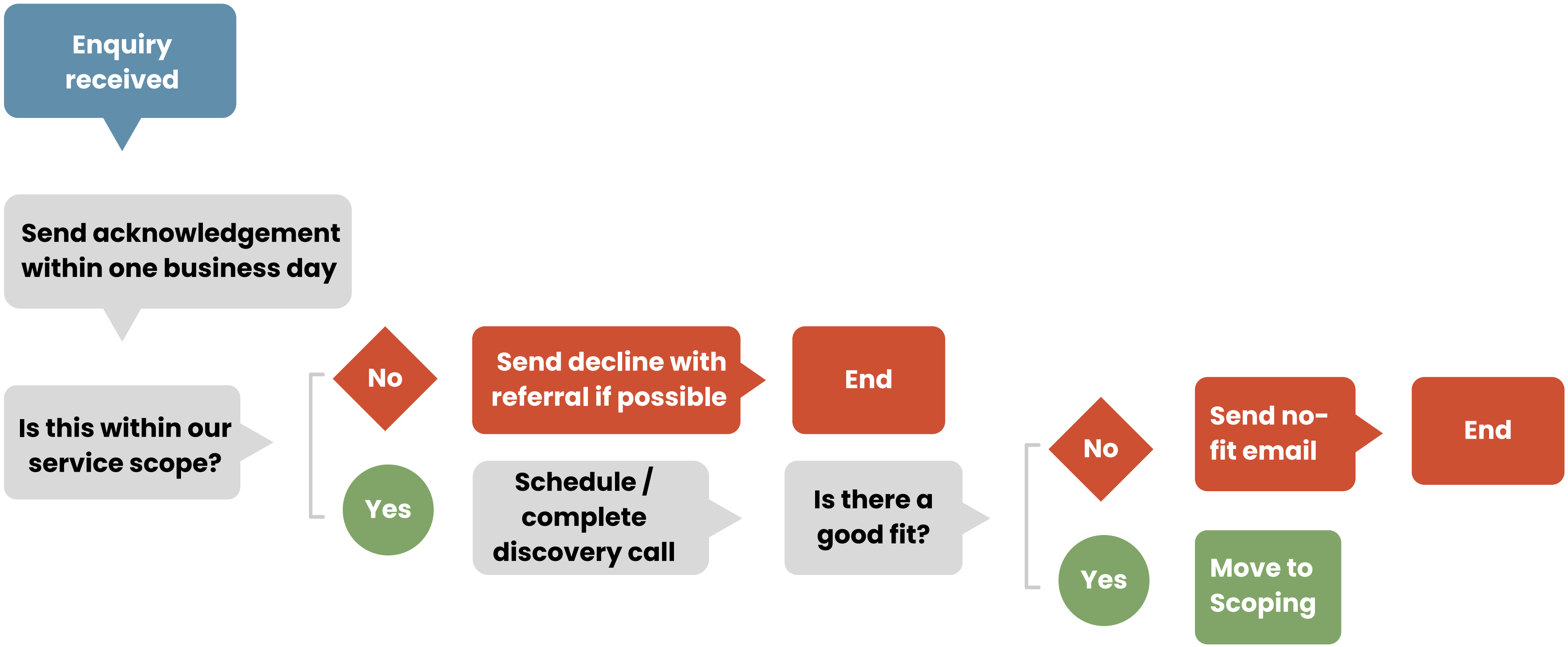
Phase 1: Enquiry Receive, acknowledge, and qualify. Every enquiry gets a response within one business day. Fit is assessed before a discovery call is scheduled — not during it.

Phase 2: Scoping Understand, propose, and confirm. A scoping questionnaire does the heavy lifting before the proposal is written. Nothing moves forward without a signed-off proposal.

Phase 3: Onboarding Set up, brief, and begin. The welcome email, deposit, and kickoff call happen in that order. Work does not begin until all three are complete.

Workflow Map

Phase 1: Enquiry



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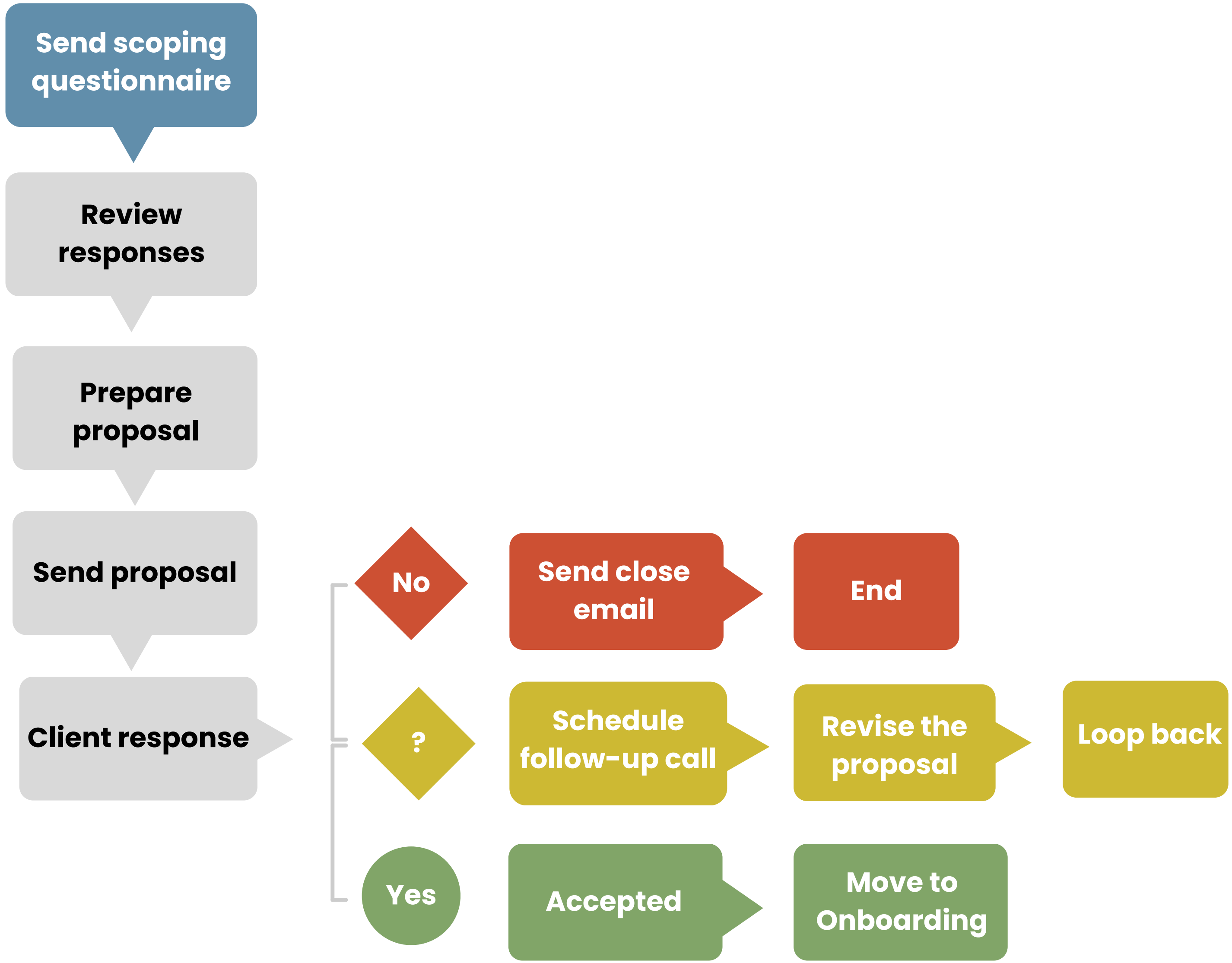
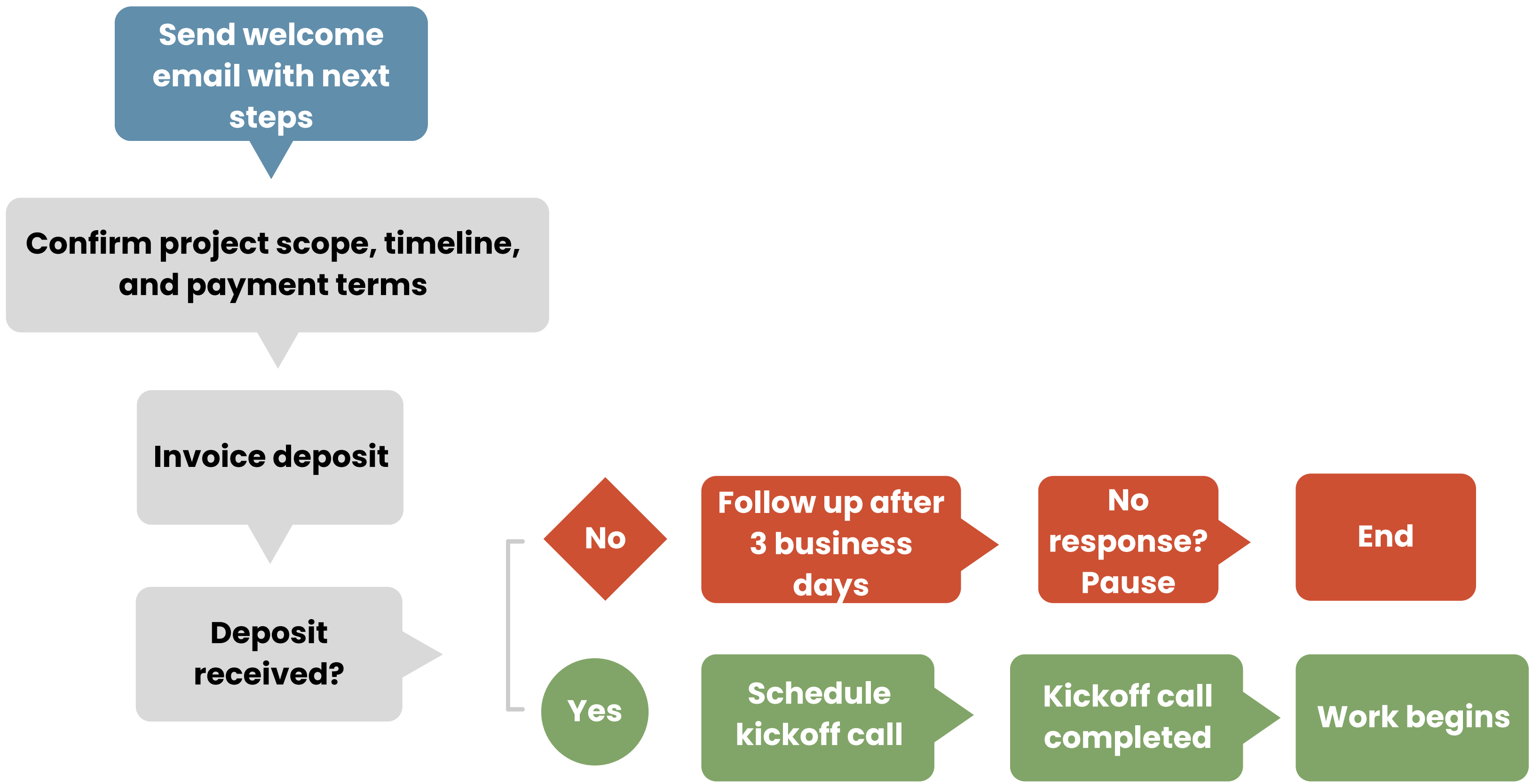
Workflow Map

Phase 2: Scoping



Workflow Map

Phase 3 Onboarding:



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Phase 1: Enquiry

Owner: Melanie Rambo / Studio lead

The acknowledgement email should go out within one business day regardless of whether the enquiry is a fit. A prompt response sets the tone and respects the person's time even if the answer is no.

The scope check happens before the discovery call — not during it. Jumping on a call with someone who needs something outside your services wastes both parties' time.

The discovery call is 20–30 minutes. Its purpose is fit assessment, not full scoping. If you're already mentally writing the proposal, you've gone too far.

Phase 2: Scoping

Owner: Melanie Rambo / Studio lead

The scoping questionnaire does the heavy lifting before the proposal is written. A proposal written without it tends to be vague, which leads to scope creep later.

Proposals should include: what's included, what's not included, timeline, investment, and next steps. No ambiguity.

One revision round is included as standard. A second revision signals a misalignment worth discussing before proceeding.

Phase 3: Onboarding

Owner: Melanie Rambo / Studio lead

The welcome email is not administrative — it's the first impression of how organised and clear working with you will be. It should include everything the client needs to know before the kickoff call so the call itself can focus on the work.

Deposit before kickoff is non-negotiable. It confirms commitment and protects your time.

The kickoff call covers: confirmed scope, working rhythm, communication preferences, and any access or information needed to begin.

Work does not begin until the kickoff call is complete.