Designing your process – and your portals

Here are the 7 steps to getting your process designed and into a portal. Feel free to use this document as a starting point to help you build your ultimate service business.

==(To edit this document, click **File -> Make a copy** and save it to your Google Drive workspace. This document is part of a workshop for [Client Portal](#)).==

Step 1:
List out every project type you currently (or could) offer

Step 2:
Choose one project to focus on

Step 3:
For this project, list out every deliverable you currently (or could) offer

Step 4:
Decide which deliverables need to be in the portal and which don't

Step 5:
Group these deliverables into phases (e.g. Discovery, Onboarding, Milestones, Aftercare, etc.)

Step 6:
Assign a content type (URL, file upload, content page, form embed, etc.)

Step 7:
Optional: Assign a CTA

Step 1: List out every project type you currently (or could) offer

- Corporate workshop - ergonomics
- Corporate workshop - managing stress
- 1-1 health coaching
- Group health coaching
- Power hour - discovery call
- Self-study online course - nutrition
- Self-study online course - strength training
- Fitness retreat
- Corporate fitness retreat
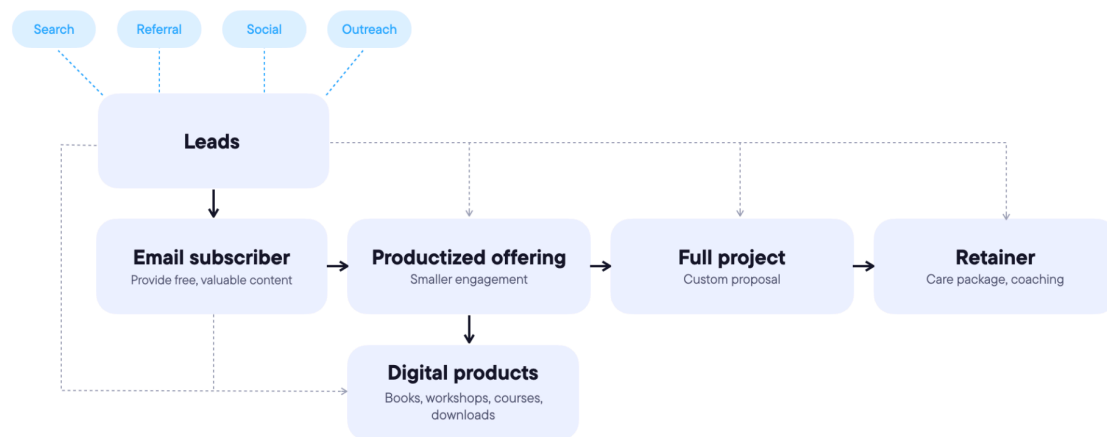
Step 2: Choose one project to focus on

- ~~Corporate workshop - ergonomics~~
- ~~Corporate workshop - managing stress~~
- ~~1-1 health coaching~~
- **Group health coaching**
- ~~Power hour - discovery call~~
- ~~Self-study online course - nutrition~~
- ~~Self-study online course - strength training~~
- ~~Fitness retreat~~
- ~~Corporate fitness retreat~~

Step 3: For this project, list out every deliverable you currently (or could) offer

Group health coaching portal

- 1-1 session recordings
- Your Goals
- Consultation report
- Invoices
- Progress update
- 1-1 skill-building sessions
- Testimonial questionnaire
- Grocery shopping guide
- Meal planner
- Contract
- Group session recordings
- Getting Started Guide
- Calendar onboarding URL
- Timeline
- Weekly check-in

Step 4: Decide which deliverables need to be in the portal and which don't

- **1-1 session recordings**
- **Your Goals**
- **Consultation report**
- ~~Invoices~~
- **Progress update**
- **1-1 skill-building sessions**
- ~~Testimonial questionnaire~~
- **Grocery shopping guide**
- **Meal planner**
- ~~Contract~~
- **Group session recordings**
- **Getting Started Guide**
- ~~Calendar onboarding URL~~
- **Timeline**
- **Weekly check-in**

Step 5: Group these deliverables into phases (e.g. Discovery, Onboarding, Milestones, Aftercare, etc.)

Phase 1: Onboarding

- **Getting Started Guide**
- **Your Goals**
- **Progress update**
- **1-1 skill-building sessions**
- **Grocery shopping guide**
- **Meal planner**

Phase 2: Your Progress

- **Consultation report**
- **Timeline**
- **1-1 session recordings**
- **Weekly check-in**

Phase 3: Group sessions

- **September session**
- **October session**
- **November session**

Step 6: Assign a content type (URL, file upload, content page, form embed, etc.)

Phase 1: Onboarding

- **Getting Started Guide**
  Content page - text and video embed
- **Your Goals**
  Content page - form embed
- **Progress update**
  Content page - Google Sheets spreadsheet embed
- **1-1 skill-building sessions**
  URL - Calendar scheduling tool
- **Grocery shopping guide**
  File upload - PDF
- **Meal planner**
  URL - Google Sheets spreadsheet

Phase 2: Your Progress

- **Consultation report**
  Content page - text
- **Timeline**
  Content page - Google Sheets spreadsheet embed
- **1-1 session recordings**
  URL - List of recordings
- **Weekly check-in**
  URL - Check-in form

Phase 3: Group sessions

- **September session**
  URL - Register for webinar
- **October session**
  URL - Register for webinar
- **November session**
  URL - Register for webinar

Step 7: *Optional:* Assign a CTA

Phase 1: Onboarding

- **Getting Started Guide**
  Content page
- **Your Goals**
  Content page - form embed
- **Progress update**
  Content page - Google Sheets spreadsheet embed
- **1-1 skill-building sessions**
  URL - Calendar scheduling tool
- **Grocery shopping guide**
  File upload
- **Meal planner**
  URL - Google Sheets spreadsheet

Phase 2: Your progress

- **Consultation report**
  Content page
- **Timeline**
  Content page - Google Sheets spreadsheet embed
- **1-1 session recordings**
  URL - List of recordings

Phase 3: Group sessions

- **September session**
  URL - Register for webinar
- **October session**
  URL - Register for webinar
- **November session**
  URL - Register for webinar

Call to action

- **Weekly check-in (CTA)**
  URL - Check-in form