

Onboarding & Feedback Guide

This guide helps clients and project managers onboard freelancers or new team members effectively, and provides a framework for delivering feedback throughout the project lifecycle.

1. Onboarding Checklist

- Provide a welcome message and project overview
- Share access to necessary tools (e.g., Google Drive, Zoom, Worksite Connect)
- Clarify roles, responsibilities, and team expectations
- Review timelines, deadlines, and communication schedules
- Introduce the point of contact or project lead
- Share any onboarding documents or templates (contracts, briefs, etc.)
- Set up first check-in meeting or call

2. Feedback Framework

- Use regular check-ins (weekly or milestone-based)
- Give specific, constructive feedback tied to project goals
- Balance criticism with positive reinforcement
- Encourage two-way feedback (invite input from freelancers)
- Document feedback and action items for accountability
- Schedule formal review sessions for long-term or complex projects

3. Wrap-Up & Final Review

At the end of the project, conduct a final review to discuss overall performance, lessons learned, and future opportunities. Provide a closing message, release final payment, and request/offer a review or testimonial.