

Client Experience Audit Sheet

A practical worksheet designed for high-end construction, fabrication, and trade-based businesses to evaluate, diagnose, and strengthen their onboarding and project delivery experience.

This audit helps identify gaps that quietly cost time, trust, and revenue — and highlights opportunities to elevate how your business is perceived and experienced.



First Contact & Lead Intake

Response Time

We respond to new inquiries within one business day or less.

Clear Next Steps

Prospects receive a clear explanation of next steps after first contact.

Lead Qualification

We qualify leads before investing time in proposals or calls.

Comprehensive Intake

Our intake process captures project scope, budget, and decision-makers.

Professional Communication

Initial communication reflects professionalism and confidence.

Qualification & Expectations

Project Selection

- We clearly define what type of projects we accept and decline.
- Clients understand our role, responsibilities, and limitations early.
- Red flags are identified before contracts are signed.

Setting Expectations

- Budget expectations are addressed before proposals are created.
- Timelines are discussed realistically, not optimistically.

Proposal & Agreement

01

Clear Structure

Proposals are clear, structured, and easy to understand.

02

Explicit Scope

Scope of work is explicit and leaves little room for interpretation.

03

Unambiguous Terms

Payment terms and schedules are unambiguous.

04

Change Orders Defined

Change orders or additional work are clearly defined.

05

Post-Approval Clarity

Clients know exactly what happens after approval.

Onboarding & Project Kickoff

Formal Kickoff

Clients receive a formal onboarding or kickoff communication.

Upfront Collection

Required files, approvals, and inputs are collected upfront.

Clear Assignments

Internal responsibilities are clearly assigned.

Point of Contact

Clients know who their point of contact is.

Milestone Outline

Project milestones are outlined at the start.

Communication During Delivery



- Clients receive consistent updates without needing to ask.
- Communication channels are clearly defined.
- Feedback and approvals follow a structured process.
- Delays or issues are communicated proactively.
- Clients feel informed, not managed.

Visuals, Documentation & Clarity



Visual Communication

We use visuals, diagrams, or references to explain complex work.



Clear Labeling

Deliverables are clearly labeled and easy to review.



Client-Friendly Language

Technical information is translated into client-friendly language.



Controlled Revisions

Revisions follow a documented and controlled process.



Clear Approvals

Clients understand what they are approving.

Change Management & Problem Handling

Managing Changes

- Scope changes are documented before work proceeds.
- Pricing adjustments are explained clearly and professionally.
- Internal team alignment remains strong during changes.

Handling Problems

- Problems are addressed calmly and directly.
- Clients feel supported, not defensive.

Project Closeout



Internal Review

Final deliverables are reviewed internally before delivery.



Clear Handoff

Clients receive a clear handoff or closeout summary.



Professional Billing

Outstanding balances are handled professionally.



Ongoing Support

Clients know what support is available after completion.



Clear Ending

The project ends with clarity, not confusion.

Post-Project Follow-Up & Next Steps

Follow-Up

We follow up after project completion.

Feedback Collection

Clients are invited to provide feedback or reviews.

Ongoing Opportunities

Opportunities for ongoing work are identified.

Top-of-Mind

We remain top-of-mind without being intrusive.

Long-Term Relationships

Past clients are treated as long-term relationships.

Next Step

If this audit revealed gaps or inconsistencies, that's normal. Most high-performing construction and trade businesses reach this stage before they formalize their client experience.

ATRIUM offers a structured Client Experience Review designed specifically for high-end trade and construction-based companies.

This review evaluates your onboarding, communication, delivery, and client-facing materials and provides clear recommendations for improvement.

Learn more or request a review at: atriumvisual.studio