

# 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.

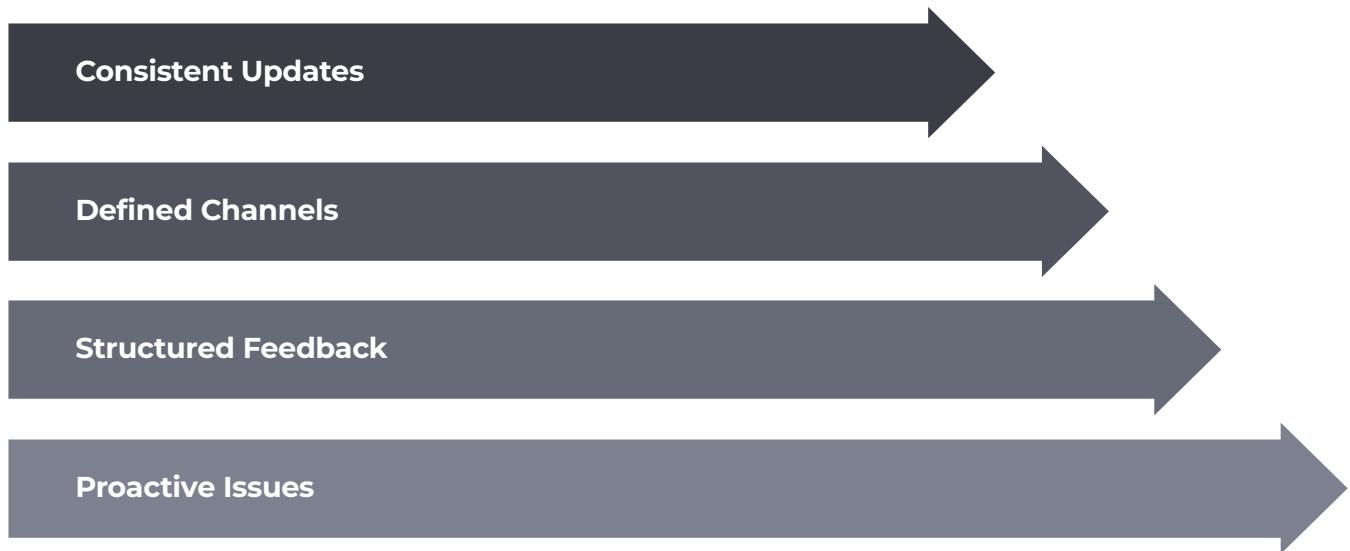
## Point of Contact

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](http://atriumvisual.studio)