5 Steps to Working with Your First Client

So you've been put on your first client account…
Not sure what to do next? Here are a few pointers to help you get started.

---

1 Do your homework

Get to know the client. Visit their external website and learn about their culture, who they are and what they do. What kind of jobs do their employees have? What is their overall goal?

2 Look at the big picture

Do a design inventory. Is it bright and playful or more straightforward and sophisticated? What's the color palette? What types of photos are used? You can find samples in Final Press PDFs or even grab one right off the shelf. Ask the project manager or artist for the client's brand standards for some extra details!

3 Dig a little deeper

Read through some of the samples you pulled. Try to get a feel for the client's writing style and overall tone. Is it formal, casual or fun? Get a little more specific by looking at their style guide in the misc drive.

4 Get to know their benefits

Now it's time to become more familiar with their terminology. Read through an enrollment guide to learn about the client's plan details. Take a few notes on what is offered and any questions you have.

5 Join the team

Get in touch with the project manager and the PartnerComm consultants you'll be working with. Ask questions about the client'spersonality and the dynamics of working with them. Be sure to ask about your own team's dynamics, too.