

FREELANCE CLIENT ONBOARDING CHECKLIST

A practical checklist for clarifying scope, communication, timelines, and payment terms before work begins.

Client Name: _____	Project Name: _____
Date: _____	

1. PROJECT SCOPE

- What exactly is being delivered (be specific)
- What is NOT included in this project
- Number of revision rounds included
- Process for out-of-scope requests
- Who provides what (content, images, access)
- Technical/format requirements

2. COMMUNICATION PREFERENCES

- Preferred communication channel
- Expected response time
- Frequency of updates
- Main point of contact
- Time zone (if applicable)

3. TIMELINE & MILESTONES

- Project start date: _____
- Project end date: _____
- Key milestones with dates:
 - 1. _____
 - 2. _____
 - 3. _____
- What client needs to provide, and by when

4. PAYMENT TERMS

■ Total cost / rate structure

■ Payment schedule

■ Accepted payment methods

■ Late payment terms (if any)

■ Invoice timing

NOTES
