

# Client Onboarding Checklist

What to collect and confirm before starting any project

Freelancers HR (FHR) | [fhrresearch.org](http://fhrresearch.org) | Detroit, Michigan

Use this checklist for every new client engagement. Complete all items before beginning work.

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## BEFORE SENDING A PROPOSAL

- Confirm the client's legal business name and primary contact
- Identify the decision-maker who can approve the contract and payment
- Define the scope of work in writing before the proposal
- Confirm budget range is realistic for the scope requested
- Check client reputation -- Google reviews, LinkedIn, freelancer forums

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## CONTRACT REQUIREMENTS

- Written contract signed by both parties before any work begins
- Scope of work clearly defined with specific deliverables listed
- Payment amount, schedule, and accepted payment methods confirmed
- Deposit collected (FHR recommends 25-50% upfront for new clients)
- Revision policy included -- number of included rounds specified
- Kill fee clause included if client cancels after work begins
- Intellectual property ownership defined -- transfers upon full payment
- Late payment interest rate and policy included
- Dispute resolution jurisdiction specified as Michigan
- Limitation of liability clause included

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## PROJECT SETUP

- Project timeline and milestone dates confirmed in writing
- Primary point of contact identified on client side
- Feedback and approval process agreed upon
- File delivery format and method confirmed
- Access to necessary tools, systems, or accounts granted

Non-disclosure agreement signed if work involves confidential information

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#### FINANCIAL SETUP

- Invoice template ready with your business name, address, and payment terms
  - Client billing contact and accounts payable email confirmed
  - Purchase order number obtained if client requires one
  - Payment method confirmed -- check, ACH, credit card
  - Net payment terms confirmed -- FHR recommends Net 14 or Net 21, not Net 60
  - Late payment policy communicated clearly before work begins
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#### AFTER PROJECT COMPLETION

- Final deliverables confirmed in writing by client
- Final invoice sent on completion date
- All project files backed up and retained per your records policy
- Testimonial or referral requested if project went well
- Follow-up reminder scheduled if final invoice is not paid by due date

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