

PROJECT-STYLE ONBOARDING Checklist



CLIENT DETAILS

Client Name: _____ Date & Time: _____ Location: _____
Phone/Email: _____ Budget Confirmed: _____ Yes _____ No

BEFORE THE QUOTE

- Gather all necessary project details
- Schedule a walkthrough or visit
- Ask clarifying questions
- Obtain permits or licenses (if needed).
Identify potential limitations

CREATING THE ESTIMATE

- Ensure pricing reflects full scope
- Include labor, tools, and time
- Avoid guess-based estimates
- Clearly define what is included

CONFIRMING SCOPE

- Outline what will and will not be done
- Address risks or restrictions
- Confirm expectations with the client

MOVING TO CONTRACT

- Send contract AFTER scope is confirmed
- Include timeline expectations
- Include payment terms
- Include contingencies

BEFORE WORK BEGINS

- Confirm all details again
- Ensure proper tools/resources are available
- Set communication & billing expectations

- If your onboarding still feels unclear or inconsistent, consider an onboarding strategy session to simplify and structure your process.