

The 9-Step Client Onboarding

Every project that ends badly started badly. Run these nine steps, in order, every time a contract is signed:

- 1 Deposit invoice issued (30–50%) — and nothing starts until it clears. No exceptions.
- 2 Welcome email: what happens next, who does what, how you work
- 3 Kick-off call booked within 5 working days
- 4 Access + assets checklist sent (brand files, content, logins via password manager)
- 5 Shared folder created, named to your convention
- 6 Project brief confirmed IN WRITING by the client
- 7 Milestones and dates into your calendar
- 8 Communication rules agreed: channel, hours, response time — write down that you don't reply at 11pm
- 9 Accounts-payable contact + PO number captured (this is how you get paid on time)

Step 9 recovers more money than any lawyer: an invoice without a PO sits in a queue nobody owns.

This is one page of a complete operating system. The £30 "Ultimate Freelance Business Operations Playbook" covers pricing floors, the 12-clause contract, scope control, the four-account money system and an 18-template pack — the whole business in ~2 hours of admin a week. → thepaidhour.com