

Freelance Client Onboarding Toolkit

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Version 1.0 • 8 October 2026

Purpose and audience

Turn an agreed service into a clear practical start: defined inputs, communication arrangements and acceptance evidence.

Freelancers preparing to begin an agreed project with a client.

Use the tools in sequence

1. Use the discovery record to confirm the client's intended result and unresolved questions.
2. Carry a project ID into the delivery brief. Confirm scope, client inputs and the person authorised to accept work.
3. Use the kickoff checklist to check access, dates and communication arrangements before starting.
4. Record changes against the agreed brief. Refer commercial or legal questions to the appropriate agreement or adviser.

Files and working method

Save a personal copy of the Word file to type into the forms. Use the PDF as a printable version. The PDF has no interactive form fields. Duplicate a tool page when you need more records. Retain the same record IDs across the three tools and record the date and version when you make a change.

This is an operational planning toolkit. It does not provide legal contract terms, tax advice or a promise of paid work.

Tool 1: Client discovery record

Use a project ID such as P01 throughout. Record what the client has confirmed and what remains an assumption.

Record date: _____ Version: _____

Project ID and client contact

Desired result and intended users

Current situation and evidence supplied

Constraints, dependencies and unresolved questions

Decision maker and approval route

Next discussion and information required

Tool 2: Delivery and acceptance brief

Confirm this with the client before starting. This planning form is not a contract or a substitute for agreed commercial terms.

Record date: _____ Version: _____

Project ID and brief version

Deliverables and explicit exclusions

Client inputs, access and due dates

Milestones and dependencies

Acceptance criteria and authorised reviewer

Change request route and linked agreement reference

Tool 3: Kickoff and handover checklist

Check each item with the relevant owner. Keep personal data and credentials out of this shared record.

Record date: _____ Version: _____

Project ID, kickoff date and attendees

Inputs and authorised access confirmed

Communication channel and review rhythm

Open issue, owner and next date

Handover files and acceptance evidence

Client confirmation and next support arrangement

Worked example

Fictional example for practice. Adapt the structure, not the facts.

P01 is a fictional five-page portfolio website. Discovery identifies one intended audience and the client's existing text. The brief excludes a shop and names the client as acceptance reviewer. A kickoff check finds that two photographs are not cleared for use, so the client owns that action before the build starts. A later request for a shop is logged for a separate scope discussion rather than being silently included.

Review your completed pack

Can both parties identify the deliverables, exclusions, inputs, reviewer and unresolved issues from the same project ID?

- All three tools use matching record IDs.
- Facts and assumptions are distinguishable.
- Outstanding actions have an owner and a date.
- Confidential information and credentials are excluded.
- The next reviewer can find the supporting evidence.

Your next action

Action: _____

Owner: _____ Due date: _____

Completion evidence: _____

Use and attribution

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