FOR FREELANCERS, CONSULTANTS AND SERVICE BUSINESSES

Client Onboarding & Project Kit

Intake, scope, proposals, kickoff, project tracking, message templates
and wrap-up. A calm, professional process for every client.

US Letter · Free sample

Business name

Client

Project

WIN THE WORK

Client Intake Questionnaire

Send this to the client or complete it together. Short, specific answers are best.

Question	Client's answer
Describe your business in a sentence or two	
Who are your customers or audience?	
What is the main goal of this project?	
What problem are we solving?	
What have you tried before?	
Examples you like (and why)	
Examples you dislike (and why)	
Deadline or key dates	
Budget range	
Who approves the work?	
Anything we should avoid?	
Materials you will provide	

SCOPE

Scope of Work Builder

A clear scope protects both sides. Be specific about what is included, what is not, and what you assume.

Project goal in one sentence

Out of scope (what is NOT included)

Deliverable	Description / format	Due date	Revisions included

Assumptions (what we rely on the client to provide)

Dependencies and risks