

THE FREELANCER KIT

Client Onboarding Pack

The 5 documents that turn a new client into a smooth project: questionnaire, welcome document, scope document, revision policy and closing document.

5 CLIENT DOCUMENTS

2026 Edition · For the buyer's personal use

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Projects rarely fail on skill. They fail on unasked questions, unwritten scope and unlimited revisions. This pack fixes all three with five ready documents, in the order you use them: (1) send the Questionnaire before you quote, (2) send the Welcome Document when the client signs, (3) attach the Scope Document to every quote, (4) attach the Revision Policy to every contract, (5) send the Closing Document with final delivery. Replace the [BRACKETS] once, keep your own copy, reuse forever.

Document 1 — Client Questionnaire

Send before quoting any project. A client who won't answer questions won't respect answers either.

CLIENT QUESTIONNAIRE – [Your Business Name]

Thank you for considering us for your project. Your answers below decide your scope, price and timeline – the more detail, the more accurate your quote.

ABOUT YOU

1. Your full name and role:
2. Business name and website (if any):
3. Best email and phone for project updates:
4. Who makes the final decision on this project? (name)

ABOUT THE PROJECT

5. What exactly do you need delivered? (describe in your own words)
6. What problem does it solve for your business?
7. Who is it for? (your customers / audience – age, location, anything known)
8. Do you have examples you like? (paste links – "something like this")
9. Do you have examples you dislike? (just as useful)
10. What must it absolutely include?
11. What must it absolutely NOT include?

MATERIALS & ACCESS

12. Will you provide: logo / text / photos / product data? (tick what exists)
13. If materials don't exist yet, who creates them?
14. Do we need access to any accounts or systems? (list them)

TIMELINE & BUDGET

15. Your ideal delivery date:
16. Is there a hard deadline? (event, launch, season) Why that date?
17. Your budget range for this project: [] under [X] [] [X]–[Y] [] above [Y]
18. If the right solution costs more than your range, do you want to see it anyway with a smaller-scope alternative? (yes / no)

WORKING TOGETHER

19. How do you prefer updates? (email / WhatsApp / weekly call)

20. How many people will review the work? (names keep feedback honest)
21. Anything else we should know before quoting?

Thank you – we reply with a written scope and fixed quote within [2] working days.

Why this works: Questions 17 and 20 are the money questions: budget range and reviewer count. Most scope fights are really 'the boss saw it late' fights — Q20 prevents them before they start.

Document 2 — Welcome Document

Send the moment a client signs or pays the deposit. This is the free sampler document — it also sells your professionalism.

WELCOME TO [YOUR BUSINESS NAME] – HERE'S HOW WE'LL WORK TOGETHER

Hello [Client Name], welcome aboard. This short document explains exactly how your project will run, so you always know what happens next.

YOUR PROJECT AT A GLANCE

- Project: [project name]
- Your project lead: [your name] – your single point of contact
- Start date: [date] · Target delivery: [date]

HOW COMMUNICATION WORKS

- All project messages go to [email] (or [WhatsApp number] if agreed).
- You get a progress update every [Friday / agreed day], even if the update is "on track, nothing new".
- Our working hours are [hours, timezone]. Messages outside hours are read the next working day. Genuine emergencies: call [number].

WHAT WE NEED FROM YOU

- Feedback within [3] working days of each draft – delays in feedback move the delivery date by the same number of days.
- One decision-maker for approvals: [name]. We work to their sign-off.
- Materials listed in the Scope Document, by the dates shown there.

HOW PAYMENTS WORK

- Deposit: [amount / %] before work begins (invoice attached).
- Balance: on final delivery, before source/final files are released.
- Payment methods: [bank transfer / methods]. Reference: [invoice number].

HOW CHANGES WORK

- Your project includes [2] rounds of revisions (see our Revision Policy).

- New requests outside the Scope Document are quoted in writing first – you approve the price before we do the work. No surprise bills, ever.

WHAT HAPPENS AT THE END

- Final files delivered in [formats].
- A closing document listing everything delivered, plus our care guide.
- Our door stays open: past clients get priority booking and [benefit].

Questions at any point: reply to this document's email. We're glad you're here.

[Your Name] · [Business Name] · [phone] · [email]

Why this works: Sent on day one, this document answers the client's silent fears (will they disappear? will the price grow? who do I call?) before those fears become complaints on day twenty.

Document 3 — Project Scope Document

Attach to every quotation. If it isn't in this document, it isn't in the price — this page is your protection.

PROJECT SCOPE DOCUMENT

Project: [name] · Client: [name/business] · Date: [date]

Prepared by: [Your Business Name] · Quote reference: [number]

1. OBJECTIVE

[One paragraph: what this project achieves for the client, in business terms – e.g. "A 6-page website that takes bookings online, replacing phone-only orders."]

2. WHAT IS INCLUDED (deliverables)

[] [Deliverable 1 – exact description, quantity, format]

[] [Deliverable 2]

[] [Deliverable 3]

[] [Deliverable 4]

Formats: [PDF / PNG / source files / as listed per deliverable]

3. WHAT IS NOT INCLUDED

- [Common assumption 1 – e.g. writing the website text]
- [Common assumption 2 – e.g. stock photos beyond the 5 included]
- [Common assumption 3 – e.g. revisions beyond the agreed rounds]

Anything not listed in Section 2 is not included. If you need it, we quote it separately in writing – before doing it.

4. CLIENT RESPONSIBILITIES

- Provide [materials list] by [date]
- One named approver: [name]

- Feedback within [3] working days per round

5. TIMELINE

Kickoff: [date] · First draft: [date] · Feedback round(s): [dates]

Final delivery: [date] – provided client responsibilities are met on time.

6. PRICE & PAYMENT

Total fixed price: [amount] · Deposit: [amount] on signing ·

Balance: [amount] on delivery. Late payment pauses the project (dates move).

7. REVISIONS

[2] revision rounds included per deliverable, per the attached Revision Policy. Additional rounds: [rate] per round, quoted before work starts.

8. ACCEPTANCE

Signature below = agreement to this scope and price.

Client: _____ Date: _____ Provider: _____ Date: _____

Why this works: Section 3 — 'what is NOT included' — is the section amateurs skip and professionals never do. Half of all project disputes are a deliverable the client assumed and the provider never priced.

Document 4 — Revision Policy

Attach to every contract and quote. Friendly in tone, absolute in effect.

REVISION POLICY – [Your Business Name]

We want you delighted with the final work – and revisions are how we get there. This policy keeps revisions fair, fast and clear for both of us.

WHAT COUNTS AS A REVISION

A revision is a change to work already delivered within the agreed scope: adjusting text, colours, layout, order, or details of a delivered draft.

WHAT IS NOT A REVISION

- New deliverables or pages not in the Scope Document
- A new direction replacing approved concepts ("start again, different style")
- Changes to sections you already approved in writing

These are new work – always quoted in writing first, at [rate].

HOW MANY ARE INCLUDED

Your project includes [2] rounds of revisions per deliverable.

A "round" = one consolidated list of changes from your named approver.

HOW TO SEND REVISIONS (so they take days, not weeks)

1. Collect all changes into ONE message or document per round.

2. Send within [3] working days of delivery of the draft.
 3. Be specific: page/section + what to change + what it should become.
- Drip-fed changes (one per day) count as separate rounds once the round's list has been submitted.

TURNAROUND

Revision rounds are returned within [2–3] working days for standard projects.

AFTER THE FINAL ROUND

Extra rounds are available at [amount] per round – always agreed before we start them. After final approval and delivery, corrections of our errors are always free within [14] days. (If we made the mistake, we fix it. Always.)

Questions: [email]

Why this works: The 'one consolidated list' rule is the heart of it. Without it, revisions arrive as 40 scattered messages over 3 weeks — with it, the same changes take one afternoon.

Document 5 — Closing & Thank-You Document

Send with final delivery. The last document a client reads decides whether they return and refer.

PROJECT COMPLETE – THANK YOU, [CLIENT NAME]

From [Your Business Name] · [date]

WHAT YOU RECEIVED (final delivery checklist)

[] [Deliverable 1 – file name and format]

[] [Deliverable 2 – file name and format]

[] [Deliverable 3 – file name and format]

Download link / location: [link or "attached to this email"]

Please download and keep your own backup copy – we archive projects for [90 days] only.

HOW TO USE & CARE FOR IT

- [Tip 1 – e.g. best print settings / upload steps]
- [Tip 2 – e.g. what not to edit and why]
- [Tip 3 – e.g. where the editable source files are]

SUPPORT WINDOW

For [14] days from today, corrections of any error in the delivered work are free – just reply to this email. After that, small updates are available at [rate], and past clients always get priority booking.

ONE SMALL FAVOUR

If you're happy with the result, a 2-sentence testimonial (just reply here) helps our small business more than any advertisement. And if you know one

person who needs [service], an introduction would mean the world.

WHAT'S NEXT FOR YOU?

Many clients follow this project with [logical next service]. When you're ready – this month or next year – you know where we are.

Thank you for trusting us with your project.

[Your Name] · [Business Name] · [phone] · [email]

Why this works: Most providers end a project with an invoice. Ending with a checklist, a care guide and a support window makes the client feel looked after at the exact moment they're deciding who to hire next time.

More from The Freelancer Kit

Done-for-you templates and tools — made to be faster than doing it yourself and more reliable than starting from a blank page:

- Freelancer Proposal Template Pack
- Freelancer Contract Template Pack
- Freelancer Invoice Template Pack
- Complete Freelancer Bundle (all three template packs)
- Excel Auto-Cleaner (Python tool)
- Bulk File Organizer (Python tool)
- PDF Toolkit (Python tool)
- Image Compressor (Python tool)
- Freelancer Proposal & CRM Sidekick (Chrome extension)
- Freelancer Sidekick Pro
- Resume & CV Template Pack
- Cover Letter Template Pack
- Business Email Templates Pack
- Cold Outreach Scripts Pack
- Social Media Content Calendar Pack

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