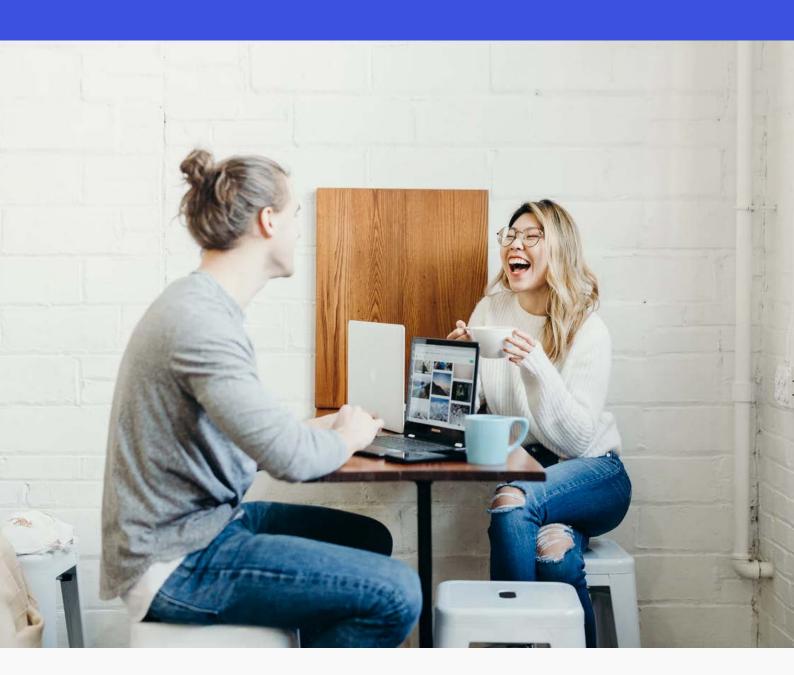
Checklist to eliminate scope creep

...and build great relationships with your clients



from

Kayla

Before you start, always agree on these details with your client and team:

CHECKLIST		SOFTWARE TIPS (click the names to visit the websites)
Agree upon these things BEFORE you start a project:		Project Home/Task Management Trello
0	Overall Project Timeline	AsanaNotion
0	Exact deadlines for each stage	Basecamp Collect files from clients on time
0	Number of revisions	• <u>Kayla</u>
0	What is included in a round of revisions	INSIDER TIP
0	When clients need to send you files (tip: use Kayla to collect files automatically)	Make sure you have a really clear contract: Crucial to include:
0	Make sure there is one decision makers and that anyone with influence is in the room from the start	 The parties involved with contact information Compensation - when, how much and at what terms Cancellation policy, how much is paid and when can a project be cancelled
0	Boost your confidence – it's ok to say no and give your client a new quote	Ownership – this is also a good place to include the right to showcase work in your portfolio Good to have:
		 Do you have any responsibility for processes happening after completion of the project? E.g. of mistakes happening in print or bugs found Acknowledgement that all work will be original Acknowledgement that confidential company

information will not be disclosed