

A FREE PROJECT-SAVING CHECKLIST

The Onboarding Checklist That Kills Scope Creep

The 15 boxes to tick between "yes" and kickoff.

Plus the three copy-paste scripts for the moments that usually cost you money.

READ THIS FIRST

Scope creep is born in week one

You landed the client. Maybe three of them. Then the "one more tiny thing?" started, and somehow you did twice the work for the same money. If you have ever said the project never ends, or that you got burned, this is for you.

Here is the part nobody tells you. Scope creep is almost never about a bad client. It is about fog. When the edges of the work are blurry, every request feels reasonable, because there is no line to point to. The fog does not roll in at week six. It forms at the very start, in the hours right after someone says yes. Clear the fog early and the whole project stays calm.

What onboarding actually is when you are a business of one

Onboarding sounds like a big-company word. For you it is simpler: it is the first 48 hours after the yes. It is the short window where you set the shape of the whole project. Get those hours right and you look organized, you sound like a pro, and you never get steamrolled. Skip them and you spend the next six weeks paying for it.

How to use this

There are 15 boxes below, in three phases. Tick all 15 before the real work starts. That is the whole method. None of them take long, and together they build the fence that keeps a project contained.

- ☐ **Work through the 15 boxes in order before you start the real work.**
- ☐ **Steal the three scripts word for word.** They handle the awkward moments so you do not have to find the words while your heart is pounding.
- ☐ **Print the one-page version at the back and pin it above your desk.**

You do not need to be tougher. You need a checklist. Turn the page.

Before you say yes

The cheapest time to protect a project is before it exists. These five happen while you are still deciding, and they save you from the projects that were always going to hurt.

☐ **1. The fit check: is this work you want more of?**

Every project teaches the market what to send you next. Before the money talk, ask if you would happily take three more just like it. If the answer is no, price it high or pass.

☐ **2. The red-flag scan**

Watch for vague goals, "quick and easy" framing, haggling before scope is even set, and going quiet during the sales chat. One flag is a conversation. Two or more is a warning.

☐ **3. Deliverables written as nouns you could count**

Not "a website." Say "five pages, one contact form, one round of stock photo selection." If you cannot count it, you cannot finish it, and "done" becomes an argument later.

☐ **4. The revision count, decided**

Pick a number now and say it out loud. Two rounds is normal and fair. Unlimited revisions is how a two-week job becomes a two-month one for the same fee.

☐ **5. A timeline with THEIR jobs on it too**

Your dates depend on their dates. Put their tasks on the timeline: when they send content, when they give feedback, when they approve. Silence on their end should never quietly become your delay.

The paperwork 15 minutes

This is the part people skip because it feels awkward. It is also the part that saves the money. Fifteen minutes here is worth more than any hour you will bill later.

A quick honest note. This checklist is practical guidance from one business owner to another, not legal advice. Agreements, contracts, and anything with real money on the line should be looked at by a lawyer near you before you sign or send. Use the plain-English wording here as a starting point, not the final word.

☐ **6. Something signed before work starts**

A short plain-English agreement is enough to start. It does not need to be scary or full of legal words. It needs to exist, and it needs both names on it, before you touch the real work.

☐ **7. The out-of-scope line, written in by name**

Name what is NOT included, on the page. "This does not include social graphics, copywriting, or ongoing updates." Naming the outside is what makes the inside hold.

☐ **8. Payment tied to milestones, not moods**

A deposit before work starts is normal and professional. Tie the rest to clear points: start, midpoint, delivery. Getting paid should never depend on how the client is feeling that week.

☐ **9. The change-order rule, in writing**

Write the rule down: new asks get a price, not a sigh. "Anything outside the list is quoted before it is done." Now a new request is just business, not a favor you resent.

☐ **10. Kill fee and pause terms, agreed**

Decide up front what happens if they cancel halfway or go quiet for weeks. A simple line covering paused and cancelled projects means a stall never leaves you unpaid for work already done.

Kickoff in one email

Now you set the tone for how the whole project runs. Done well, this is one email and a few minutes of setup, and it makes you look completely on top of it.

☐ **11. The kickoff email, sent**

One email confirms everything you just agreed and starts the project on your terms. The exact words are on the next page. Send it before any real work, not after.

☐ **12. One shared home for the project**

One link: a folder, a doc, or a board. Files, notes, and decisions live there. When there is one home, nothing important gets lost in a thread or a text you cannot find.

☐ **13. Communication rules, set**

Say where messages live, how fast you reply (one business day is plenty), and the no-DM-scope rule: any ask made in chat gets restated in the project home before it counts. Casual messages are where scope quietly grows.

☐ **14. The first milestone, dated**

Give the project a real first date, not just an end date. A near, specific milestone gives it momentum and gives you an early checkpoint to make sure you are both on track.

☐ **15. The "what does done look like" sentence, agreed**

Write one plain sentence you both accept: "Done means the five pages are live, approved, and loading on your phone." When you can both point to "done," the project can actually end.

The three scripts

Three moments cost freelancers more money than anything else. Here is exactly what to say in each one. Warm, clear, no apology for having a process. Copy them, swap in your details, send.

1. The kickoff email

Hi [Name], really glad we are doing this. Here is the quick plan so we are on the same page from day one.

What I am delivering: [the counted deliverables, as nouns]. That includes [X, Y, Z] and does not include [the out-of-scope items], which we can always add separately.

Revisions: [two] rounds are built in. Timeline: I will have the first milestone to you by [date]. To hit that, I need [content / logins / answers] from you by [date].

Everything for the project lives here: [one link]. Let us keep notes and files there so nothing gets lost. I reply to messages within [one business day].

Anything look off? Tell me now and we will fix it. Otherwise I am starting [date]. Excited to get going.

When to send: right after the yes and the signed agreement, before you start the work.

2. The "that is a change order" reply

Happy to add that. Here is what it changes.

That falls outside our original list, so it is a small add-on: [price]. It would also move the [milestone / delivery] by about [time], since it is extra work on top of the plan.

Want me to fold it in? Just say yes and I will update the timeline and send a quick note confirming it. If you would rather keep the project as is, no problem at all, we stick to the original plan.

When to send: the moment a request lands that is outside the list you agreed.

3. The scope line for your proposals

This project includes [X, Y, Z]. Anything outside that list is quoted separately, so there are never surprise invoices and you always know the price before any extra work happens.

When to send: in every proposal or quote you send, before a project ever starts.

None of these need to be tough. They just need to exist before you are in the awkward moment. Having the words ready is what keeps you calm.

PRINT THIS PAGE. PIN IT ABOVE YOUR DESK.

The 15 boxes, one page

Tick all 15 before the real work starts. Every project, the same way.

Phase 1 / Before you say yes

- ☐ 1. Fit check: would I want three more like this?
- ☐ 2. Red-flag scan: vague goals, haggling, ghosting during the sale.
- ☐ 3. Deliverables written as nouns I can count.
- ☐ 4. Revision count decided and said out loud (two is normal).
- ☐ 5. Timeline with THEIR jobs and dates on it too.

Phase 2 / The paperwork 15 minutes

- ☐ 6. Something signed before work starts (plain-English is fine).
- ☐ 7. The out-of-scope line written in, by name.
- ☐ 8. Payment tied to milestones, not moods. Deposit up front.
- ☐ 9. Change-order rule in writing: new asks get a price.
- ☐ 10. Kill fee and pause terms agreed.

Phase 3 / Kickoff in one email

- ☐ 11. The kickoff email sent (before any real work).
- ☐ 12. One shared home for the project: one link.
- ☐ 13. Communication rules set, including the no-DM-scope rule.
- ☐ 14. The first milestone dated.
- ☐ 15. The "what does done look like" sentence written and agreed.

Practical guidance, not legal advice. Have a local lawyer review anything important before you sign or send it.
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Your next step

This checklist just protected one project. Now picture running every project this way without thinking about it: onboarding, running the work, protecting your scope, and handoffs so clean they turn into referrals.

That is the Delivery and Operations OS inside The Solo Business OS. It is the same calm system, wired up for every client you take, so you never have to rebuild the fence from memory again.

The Solo Business OS
See how it works at heywork.shop

The Solo Business OS is a one-time purchase. No subscription. It runs in the Excel or Google Sheets you already own, and your data stays on your machine.

Hey. You can actually do this.