

ONBOARDING

Checklist

**This checklist is the
next steps to take
when you know you
want to work with
your client.**

1

Welcome

Send client a welcome pack
Send a brand survey

2

Legal

Send the client a contract
Send the client a NDA

3

Finance

Add client to accounting software
Confirm rates and send initial invoice

4

Communication & Project Management

Clarify how project will be time tracked
(unless set package)

Schedule a call post discovery to walk
through steps

Set up client on Milanote (or another
comms platform) to show the stages
of work and deliverables

1

Welcome Pack

It's important to kick things off right when starting a new project with a client. In a Welcome Pack I provide an intro to myself and a survey link so I can get to know my clients better. Transparency and clear communication is so key when working with any client!

Consider how you can approach a Welcome Pack in a creative way. Some ideas include sending a physical pack to clients along with a plant to represent the brand you are growing together.

I'm looking forward
to working with you!



2

Legal

Contracts and NDA's are essential, but aren't something to be spending too much time on.

Setting up your templates for these forms in advance makes the process a lot more simple - consider making this process as easy for the client to read and sign (Adobe Sign, 17Hats have features that allow clients to sign easily).

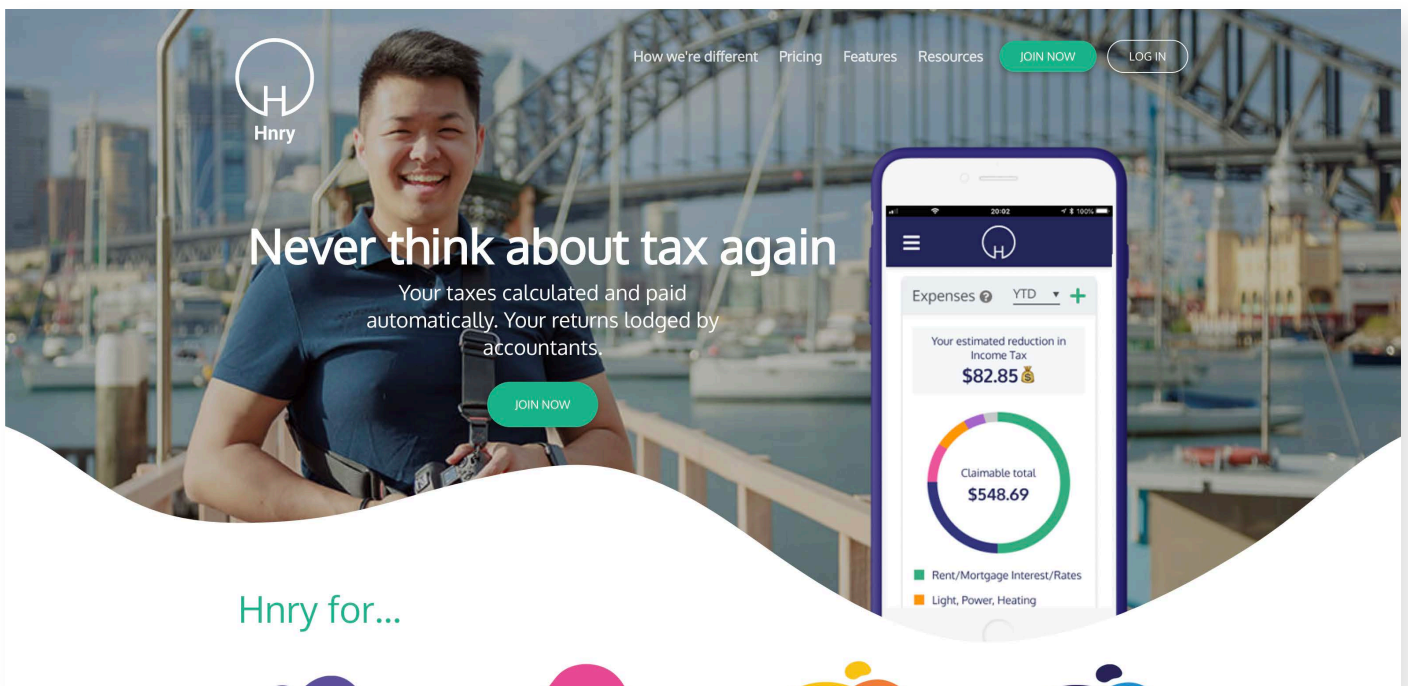
<p>This Contract is ongoing, until ended by the client or the designer. Either party may end this Contract for any reason by sending an email or letter to the other party, informing the recipient that the sender is ending the Contract and that the Contract will end in 7 days. The Contract officially ends once that time has passed.</p> <p>7. Ownership and rights</p> <p>(a) Ownership. The Client Owns All</p> <p>(b) Permitted Use By Designer. On the Designer will only have rights to product as part of portfolios and is the work and not for any other purpose work product to make money or for license, even after the Contract ends</p> <p>(c) Credit to the Designer. The Client publishes the work product.</p> <p>8. Code of fair practice</p> <p>The Designer warrants and represents hereunder is original and has not been used on an unlimited basis; that all work parties is original or, if previously published, that the Designer has full authority to use that the Client or others may make Client expressly agrees that it will hold the Designer's product to the extent such use infringes on the rights of others.</p> <p>9. Limitation of liability</p> <p>Client agrees that it shall not hold the Designer or Client, any client</p> <p>10. Dispute Resolution</p> <p>Any disputes in excess of maximum submitted to binding arbitration by American Arbitration Association, any court having jurisdiction there attorney's fees, and legal interest brought by client or by designer will</p> <p>11. Competitive Engagements</p> <p>The Designer agrees not to provide ends, unless the Designer obtains</p>	<p>This Contract is ongoing, until ended by the client or the designer. 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The Client is under no obligation to give credit to the Designer each time it publishes the work product.</p> <p>8. Code of fair practice</p> <p>The Designer warrants and represents that, to the best of his/her knowledge, the work assigned hereunder is original and has not been previously published, or that consent to use has been obtained on an unlimited basis; that all work or portions thereof obtained through the undersigned form third parties is original or, if previously published, that consent to use has been obtained on an unlimited basis; that the Designer has full authority to make this agreement; and that the work prepared by the Designer does not contain any scandalous, libelous, or unlawful matter. This warranty does not extend to any uses that the Client or others may make of the Designer's product that may infringe on the rights of others. Client expressly agrees that it will hold the Designer harmless for all liability caused by the Client's use of the Designer's product to the extent such use infringes on the rights of others.</p> <p>9. Limitation of liability</p> <p>Client agrees that it shall not hold the Designer or his/her agents or employees liable for any incidental or consequential damages that arise from the Designer's failure to perform any aspect of the project in a timely manner, regardless of whether such failure was caused intentional or negligent acts or omissions of the Designer or Client, any client representatives or employees, or a third party.</p> <p>10. Dispute Resolution</p> <p>Any disputes in excess of maximum limit for small-claims court arising out of this Agreement shall be submitted to binding arbitration before a mutually agreed-upon arbitrator pursuant to the rules of the American Arbitration Association. The Arbitrator's award shall be final, and judgment may be entered in any court having jurisdiction thereof. The client shall pay all arbitration and court cost, reasonable attorney's fees, and legal interest on any award of judgment in favor of the Designer. All actions, whether brought by client or by designer will be filed in the designer's state/county of business/residence.</p> <p>11. Competitive Engagements</p> <p>The Designer agrees not to provide work or services for a Competitor of the Client until this contract ends, unless the Designer obtains written pre-approval from the Client.</p>	<p>This Contract is ongoing, until ended by the client or the designer. Either party may end this Contract for any reason by sending an email or letter to the other party, informing the recipient that the sender is ending the Contract and that the Contract will end in 7 days. The Contract officially ends once that time has passed.</p> <p>7. Ownership and rights</p> <p>(a) Ownership. 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3

Finance

Setting up invoicing systems is the admin work not designer likes, but every freelancer needs to do.

I use a platform (Hnry) for invoicing as it calculates tax, superannuation and acts as my accountant for me. If you're freelancing this is the easiest way to understand how much money needs to be allocated for what.

A promotional banner for Hnry, a financial platform for freelancers. The background shows a smiling man on a boat. The Hnry logo is in the top left. Navigation links include 'How we're different', 'Pricing', 'Features', 'Resources', 'JOIN NOW', and 'LOG IN'. The main headline is 'Never think about tax again', followed by the text 'Your taxes calculated and paid automatically. Your returns lodged by accountants.' and a 'JOIN NOW' button. On the right, a smartphone displays the Hnry app interface, showing 'Expenses YTD', 'Your estimated reduction in Income Tax \$82.85', and a 'Claimable total \$548.69' with a donut chart. The chart is divided into 'Rent/Mortgage Interest/Rates' (green) and 'Light, Power, Heating' (orange). The text 'Hnry for...' is at the bottom left.

Hnry

How we're different Pricing Features Resources JOIN NOW LOG IN

Never think about tax again

Your taxes calculated and paid automatically. Your returns lodged by accountants.

JOIN NOW

Expenses YTD +

Your estimated reduction in Income Tax
\$82.85

Claimable total
\$548.69

- Rent/Mortgage Interest/Rates
- Light, Power, Heating

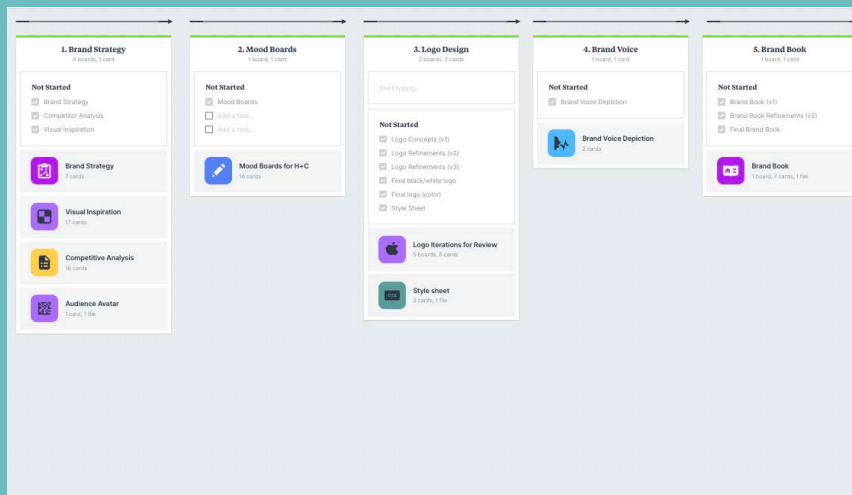
Hnry for...

4

Communication and Project Management

It's important to establish how and where you will be sharing progress with your clients. To avoid things being lost through email, I set my clients up on Milanote.

Milanote allows you to lay out your entire process, marking off stages as they are complete. You can guide your clients through the journey where they can comment, select and add images to your boards.



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