



MISSION: WOW! CHECKLIST

Be Awesome!

Your Client Checklist

CLIENT NAME: _____

BUSINESS NAME: _____

START DATE: _____

EXPECTED FINISH DATE: _____ ACTUAL FINISH DATE: _____

Ensure that the client is a good fit before commencing and work with them.
Make sure you are both clear on the task, the roles, and the expected outcome.

Task

- Have you confirmed the task with the client?
- Did you paraphrase back to them to ensure you are on the same page?
- Have you clearly defined timelines and availability?
- Have you clearly outlined pricing and payment expectations?
- Does the client understand their role and what they need to do?
- Have you scheduled it into your day/week/month?
- Have you updated the client?
- Have you identified any issues and dealt with them promptly?
 - If yes, did you suggest a solution(s) to your client?
 - Were you able to fix the issue or work within its limits?
- Have you delivered on time and on budget?
- Has the client confirmed receipt? If not, have you followed up?
- Have you confirmed with the client that the service was excellent? (requested feedback on product/service)
- Have you asked the client if you can assist them with anything else?
- Have you identified any ways that the client could improve the process?
- Have you identified any way in which you could improve the process?
- Have you brought any potential improvements to the client's attention?
- Have you gone above and beyond for the client?
- Have you invoiced the client?
- Have you received payment?
- Have you connected the client to any useful resources, people or events to help them in their business?
- Have you secured additional work?
 - If yes, start again!

CLIENTS YOU CAN'T HELP

- Have you understood their needs?
- Have you provided them with some alternatives?
- Have you connected the client to someone who can help them?
- Have you followed up to make sure their needs were met?

Notes
