SAMPLE

Excerpt from: Client Onboarding Playbook

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SKILLQUESTERS



THE CLIENT ONBOARDING PLAYBOOK

7 systems for freelancers:
from first call to raving fan

2026 Edition

skillquesters.com

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Introduction

Clients don't leave over quality. They leave over chaos.

Here's a painful truth: most freelancers don't lose clients because their work is bad. They lose clients because of chaos - missed updates, unclear scope, surprise invoices, radio silence for two weeks. The freelancer who communicates clearly, sets expectations upfront, and delivers systematically will outperform the more talented freelancer who wings it. Every time.

This playbook gives you 7 complete systems: discovery calls, proposals, contracts, kickoffs, communication, delivery, and offboarding. Each system includes exact scripts, templates, and checklists. Copy them, customize once, reuse forever.

The 7 systems:

- **System 1 - Discovery:** The 25-minute call that qualifies clients and prevents disasters.
- **System 2 - Proposal:** Proposals that close (structure, pricing, psychology).
- **System 3 - Contract:** Protect yourself without a lawyer (essential clauses).
- **System 4 - Kickoff:** Start projects right (alignment meeting that prevents scope creep).
- **System 5 - Communication:** Keep clients informed without being overwhelmed.
- **System 6 - Delivery:** Deliver work that wows (presentation matters as much as quality).
- **System 7 - Offboarding:** End projects professionally (testimonials, referrals, repeat business).

WHY IT WORKS: *Run these systems in order for EVERY client, even small ones. Especially small ones. Small projects with no process become big headaches.*

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