Your first client checklist

Before you begin the first task, confirm the result, the people and the next step. Tick each item when it is agreed.

01 **Confirm the first week’s result** ☐

Write one visible outcome the client will recognise as useful.

02 **Agree priorities and boundaries** ☐

Confirm task order, available time and actions needing approval.

03 **Collect the missing context** ☐

Ask about tools, files, communication and decision makers.

04 **Request access safely** ☐

Use individual invitations or delegated access. Do not email passwords.

05 **Book a focused kickoff** ☐

Confirm the date, time zone, meeting link and questions to resolve.

06 **Record owners and deadlines** ☐

For every action, name who acts, by when and what Done means.

07 **Make the work visible** ☐

Use a shared tracker. Flag blockers and continue agreed, unblocked work.

08 **Agree the first update** ☐

Set a date to share results, blockers and the client’s next decision.

MY NEXT ACTION

_____

OWNER _____ **DUE** _____

Explore the editable kit and a complete fictional example.

first-client-ready.saiashok49.chatgpt.site