

Client checklist



The voice of freelancing

Just engaged a freelancer or contractor? This checklist will help the project get off the ground smoothly.

#	ITEM	CHECK
1	Signed contract received from the freelancer or agency? Ensure the engagement is agreed in writing with a ‘contract for services’ or a purchase order for smaller projects.	
2	Terms of Reference agreed with the freelancer? Agree the objectives, deliverables, timescales, budget, reporting structure and how the deliverables will be evaluated. These should be recorded in writing as a statement of work to accompany the contract.	
3	Confidentiality issues covered? If the freelancer is likely to be privy to confidential or commercially sensitive information, ensure they sign a non-disclosure agreement.	
4	Billing process set-up? Ensure procedures are in place for authorising timesheets or signing off invoices.	
5	Is working onsite necessary, where are they going to sit? Ensure there is a workstation for the freelancer, that appropriate site security and parking advice is issued and that they know who to ask for on arrival.	
6	What resources have you agreed to provide? Are they ready? Ensure any required information or equipment is available and access to any required systems and networks is in-place.	
7	Issues connecting freelancer’s own equipment to your systems? Ensure the freelancer is aware of technical requirements/restrictions when connecting their equipment to your network (e.g. security, PAT testing etc)	
8	Relevant information provided on company policies? Ensure the freelancer is aware of any relevant security and/or specific health and safety policies.	
9	Project review points scheduled? Agree a regular communication schedule to review project milestones. Diarise provisional dates for periodic meetings involving key parties.	
10	Relevant information provided regarding company procedures? Provide access to internal standards, procedures and documentation (e.g. company guidelines, document templates etc).	
11	Wider team briefed? Ensure colleagues are aware of the freelancer’s role in the project and that relevant team members are expecting contact from the freelancer. Make sure a list of key contacts is available to the freelancer.	
12	Additional Points...	

For more top tips and contractual advice to help you get the best from freelance resources visit:

www.britainsbraingain.com

Produced by PCG, the professional association supporting freelancing.

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