STANDARD OPERATING PROCEDURE

The Client Scope & Protection Playbook

Stop the chaos. Set the rules. Get paid — every time.

A complete system for freelancers & small service businesses
to on-board clients, lock in boundaries, and protect their work and income.

Modules 1–6 · Scripts, Checklists & Progress Trackers Included

How to Use This Playbook

This SOP is built for people who are great at their craft but tired of being burned by unclear client expectations, revision loops that never end, and invoices that don't get paid. You don't need any prior business experience. Every module is self-contained — read it, apply it, and tick the boxes as you go.

Read	Each module covers one specific part of the client relationship. Read it fully before applying.
✓ **Checklists**	Use the checklist at the end of each module before moving to the next client step.
Track	Fill in your Progress Tracker score honestly — it shows exactly where you're strong and where to improve.
Scripts	Copy the scripts word-for-word, then personalise with your name and service type.
Repeat	Re-use this system for every single client — consistency is where the protection comes from.

What You Will Have After This Playbook

- A professional client intake process that sets expectations from Day 1
- A clear, written scope that makes 'but I thought that was included' impossible
- A revision policy that stops endless back-and-forth for free
- Payment terms that actually get followed — with scripts for chasing late invoices
- A clean offboarding process that ends every project on your terms
- A personal scorecard so you can see your improvement over time

Table of Contents

MODULE
1

The Client Intake Process

What to do before you ever say yes — and before they pay a penny.

WHY THIS MODULE EXISTS

Why This Module Exists

Most freelancers skip intake. They get an enquiry, they reply, they start work. Then three weeks in, the client says 'I thought this included X' and suddenly you're doing extra work for free — or having an uncomfortable conversation you weren't prepared for. This module fixes that. A solid intake process filters out bad-fit clients early, sets the tone for the entire relationship, and gives you information you need to price and scope accurately.

> **☐ New to business?**
>
> Think of intake like a job interview — except YOU are interviewing THEM. You're deciding if this client is someone you want to work with, not just if they'll hire you.

STEP 1

Step 1 — The Initial Response (Within 24 Hours)

When an enquiry comes in, don't panic and agree to everything on the first message. Send a short, professional response that acknowledges them and moves them into your intake flow.

✎ EMAIL **SCRIPT: First Response to a New Enquiry**

```
Subject: Re: [Their subject line]


Hi [Name],
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Thank you for reaching out! I'd love to learn more about your project.

To make sure I can give you an accurate quote and timeline, I've put
together a few short questions — it takes about 3 minutes to complete.

[Link to intake form / or paste questions below]

Once I have your answers, I'll get back to you within [48 hours /
2 business days] with next steps.

Looking forward to it,
[Your Name]
```

STEP 2

Step 2 — The Intake Form (The 8 Questions You Must Ask)

You can use a free Google Form, Typeform, or even a simple email. The goal is to get this information BEFORE your discovery call — so you don't waste an hour on a call only to find out they have a £50 budget.

Q1: What is the project?	Ask them to describe it in 2–3 sentences in their own words.
Q2: What is the deadline?	Hard deadline or flexible? This affects your pricing.
Q3: What is your approximate budget?	Give them ranges, e.g. Under £500 / £500–£1,500 / £1,500+
Q4: Have you worked with a professional like me before?	First-timers need more hand-holding — factor this into your time.

COMPLETION CHECKLIST

Module 1 — Completion Checklist

- ☐ Initial enquiry responded to within 24 hours
- ☐ Intake form sent and completed by client
- ☐ Budget and deadline confirmed before booking a call
- ☐ Discovery call held (30 minutes max)
- ☐ Red flags reviewed — decision made to proceed or decline
- ☐ Post-call follow-up sent with proposal date confirmed

PROGRESS TRACKER

Module 1 — Progress Tracker

Rate yourself after every client using this module. Be honest — the score only helps you if it's real.

Skill Area	What to Measure	My Score (1–10)
Enquiry Response Speed	Am I replying within 24 hours consistently?	___ / 10
Intake Form Usage	Did I send the form before the call?	___ / 10
Red Flag Detection	Did I identify any concerns before starting?	___ / 10
Call Structure	Did I stick to 30 minutes?	___ / 10

MODULE
3

Revision Policy — Ending the Endless Loop

The script for when 'just one more small thing' has turned into a full redo.

WHY THIS MODULE EXISTS

Why This Module Exists

The most upvoted post in the r/freelance community (89,000+ people agreed with it) was titled: 'Client wants 47 revisions and refuses to pay.' The comments were full of freelancers who felt exactly the same. This module gives you the system to make that situation structurally impossible before it ever starts.

HOW MANY TO INCLUDE

How Many Revisions Should You Include?

One round	Small, quick projects. E.g., a single graphic, a short piece of copy.
Two rounds	Standard for most projects. First draft → client feedback → revision → final.
Three rounds	Complex or high-value projects where decisions involve multiple stakeholders.
Unlimited	□ NEVER offer this. It has no boundary and will be exploited.

DEFINING A ROUND

Defining What a ‘Round of Revisions’ Actually Means

A 'round' is one consolidated set of feedback, submitted at one time — not five separate emails over three days. Make this explicit in your SOW:

MODULE
4

Payment Terms & Late Invoice Scripts

How to get paid — and what to say when you're not.

WHY THIS MODULE EXISTS

Why This Module Exists

Late payments are not just a cash flow problem — they're a confidence problem. Most people don't follow up because they feel awkward, so invoices sit unpaid. This module removes the awkwardness by giving you a word-for-word system.

PAYMENT STRUCTURE

The Payment Structure That Protects You

Project under £/$/€500	50% deposit upfront. 50% on delivery.
Project £500–£2,000	50% deposit upfront. 50% on delivery — or milestone-based.
Project over £2,000	33% upfront, 33% at midpoint, 33% on delivery.
Ongoing monthly retainer	Invoice on the 1st. Due by the 15th. Work pauses if unpaid.

✦ **Rule to Live By**

Never begin work without a deposit. A client who won't pay upfront won't pay at the end either.

BONUS

Your Master Progress Scorecard

Track your growth across every client project

Rate yourself on each dimension from 1–10 after completing a client project. Fill in three columns over time — your first client, your fifth, and your tenth. Watch the scores improve.

Dimension	Client 1	Client 5	Client 10	Notes
Intake Quality	___ /10	___ /10	___ /10	
Scope Clarity	___ /10	___ /10	___ /10	
Revision Management	___ /10	___ /10	___ /10	
Payment Collection	___ /10	___ /10	___ /10	
Mid-Project Communication	___ /10	___ /10	___ /10	
Offboarding Experience	___ /10	___ /10	___ /10	
Client Satisfaction	___ /10	___ /10	___ /10	
Your Confidence	___ /10	___ /10	___ /10	
Time vs. Budget	___ /10	___ /10	___ /10	
Overall Project Health	___ /10	___ /10	___ /10	
TOTAL SCORE	**___ /100**	**___ /100**	**___ /100**	

Quick Reference — The Complete System at a Glance

Before the Project

- Send intake form → discovery call → proposal → SOW → deposit → start
- Never begin work without a signed scope AND a deposit
- State revision limit and rate in the SOW

During the Project

- Run mid-project check-in on schedule
- Document all client decisions in writing
- Log any scope change requests immediately — quote before acting

At Delivery

- Send final deliverables + final invoice at the same time
- Get written approval from client
- Send review request 2–3 days later

If Things Go Wrong

- Revisions exceeded: use Module 3 Script B
- Direction change: use Module 3 Script C
- Invoice overdue: follow Module 4 sequence in order

YOU'VE BEEN READING A FREE PREVIEW

The Full Playbook Includes:

- 6 Complete Modules — from first enquiry to final invoice
- 13 Ready-to-Copy Email Scripts — paste directly and send
- Step-by-step Checklists for every stage of client work
- Progress Trackers across all 6 modules
- Master Scorecard — track growth across 10 dimensions
- Quick Reference — the entire system on one page
- BONUS: Copy-Ready Scripts Cheat Sheet (separate file)

Complete bundle — Main Playbook (PDF + Word) + Bonus Scripts Cheat Sheet (Word)

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Stop doing free work. Stop chasing invoices. Stop winging it.

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