



# PRE-PROJECT CHECKLIST

Workflow Automation Delivery Framework

ENTERPRISE EDITION

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# Pre-Project Checklist

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## Everything Before Development Begins

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### Lead Qualification Checklist

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#### Initial Screening

Lead source documented

Source: \_\_\_\_\_

Type of project identified

New automation build

Existing automation fix/upgrade

Consulting/advisory

Training

Other: \_\_\_\_\_

Budget range discussed

Under \$1,000

\$1,000 - \$5,000

\$5,000 - \$15,000

\$15,000 - \$50,000

\$50,000+

Retainer model

Timeline expectations

ASAP / Urgent

Within 2 weeks

Within 1 month

Flexible

Specific date: \_\_\_\_\_

Decision maker identified

Name: \_\_\_\_\_

Role: \_\_\_\_\_

## Qualification Criteria

Has clear business problem to solve  
Has budget allocated  
Has authority to proceed  
Has realistic expectations  
Is responsive and communicative  
Project aligns with your expertise

## Discovery Call Checklist

### Pre-Call Preparation

Research client's business  
Company: \_\_\_\_\_  
Industry: \_\_\_\_\_  
Size: \_\_\_\_\_  
Website reviewed:

Review any materials they've sent  
Prepare discovery questions  
Have portfolio/case studies ready  
Test video/audio equipment  
Calendar invite sent with agenda

## Discovery Call Agenda

Duration: 30-45 minutes

### INTRO (5 min)

- Introductions
- Set expectations for the call
- Confirm time available

### THEIR SITUATION (15 min)

- What does your business do?
- What's the problem you're trying to solve?
- What's the current process?
- What tools/systems are you using?
- What's the impact of this problem?
- What would success look like?

### TECHNICAL DISCOVERY (10 min)

Current tech stack

Systems: \_\_\_\_\_

Integrations needed: \_\_\_\_\_

Data sensitivity level

- Low (general business)
- Medium (customer data)
- High (PII, financial, health)

Compliance requirements

GDPR

HIPAA

SOC2

Other: \_\_\_\_\_

None specific

### BUDGET & TIMELINE (5 min)

- Budget range confirmed
- Timeline requirements discussed
- Decision timeline understood

### NEXT STEPS (5 min)

- Explain your process
- Outline next steps
- Set proposal delivery date
- Answer their questions

## Post-Discovery Documentation

Notes transcribed/organized  
Key requirements documented  
Technical requirements listed  
Red flags noted (if any)  
Decision to proceed or not

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# Scope of Work Checklist

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## Essential Sections

## PROJECT OVERVIEW

Client name and contact  
Project name  
Project description (1-2 paragraphs)  
Business problem being solved

## DELIVERABLES (Specific and Measurable)

Each workflow listed separately  
Workflow 1: \_\_\_\_\_  
Workflow 2: \_\_\_\_\_  
Workflow 3: \_\_\_\_\_  
Integrations specified  
Integration 1: \_\_\_\_\_  
Integration 2: \_\_\_\_\_  
Documentation included  
Training included (if any)

## SUCCESS CRITERIA

Measurable outcomes defined  
Criterion 1: \_\_\_\_\_  
Criterion 2: \_\_\_\_\_  
Criterion 3: \_\_\_\_\_  
Definition of "done" clear

## WHAT'S NOT INCLUDED (Critical!)

List exclusions explicitly  
Exclusion 1: \_\_\_\_\_  
Exclusion 2: \_\_\_\_\_  
Exclusion 3: \_\_\_\_\_  
How out-of-scope requests handled

## TIMELINE

Phases outlined (not specific dates)  
Milestones defined  
Client dependencies noted

## PRICING

Total project fee  
Payment schedule  
Deposit: \_\_% / \$\_\_\_\_\_  
Milestone payments  
Final payment: \_\_% / \$\_\_\_\_\_  
What triggers each payment

## TERMS

Revision policy  
Change request process  
Communication expectations  
Support period included

## Client Expectations Section

What client must provide:

- Sample data/examples
- API credentials/access
- n8n environment
- Timely feedback
- Decision authority
- Availability for calls

Expected response times:

- Client response time for feedback
- Your response time for questions

## Contract Checklist

### Essential Contract Elements

- Parties clearly identified
- Scope of Work attached/referenced
- Payment terms specified
- Intellectual property terms
  - Client owns deliverables when paid
  - Consultant retains generic patterns/templates
- Confidentiality clause
- Limitation of liability
- Termination clause
- Dispute resolution
- Governing law
- Signatures and dates

### Before Signing

- Client has reviewed and agreed
- All questions addressed
- Both parties signed
- Executed copy to both parties

# Pre-Kickoff Preparation

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## Client Requirements

Send to client before kickoff:

Kickoff call invitation

Date: \_\_\_\_\_

Time: \_\_\_\_\_

Duration: 60 minutes

Pre-kickoff requirements email:

Sample data/examples to prepare

Accounts to sign up for

People who should attend

Questions to think about

n8n setup instructions

Which hosting option recommended

Link to sign up

What to configure before kickoff

## Your Preparation

Review signed scope of work

Prepare kickoff presentation/agenda

Set up project management (if used)

Create project folder structure

Prepare credential setup guide (Loom)

List all integrations needed

Research any unfamiliar APIs

# Payment Checklist

## Before Starting Work

Deposit received  
Amount: \$\_\_\_\_\_  
Date received: \_\_\_\_\_  
Payment method: \_\_\_\_\_

Payment confirmed in bank  
Receipt/invoice sent to client  
Project officially started

## Payment Schedule Tracking

Payment 1 (Deposit):  
Amount: \$\_\_\_\_\_  
Due: \_\_\_\_\_  
Received:

Payment 2 (Milestone):  
Amount: \$\_\_\_\_\_  
Due: \_\_\_\_\_  
Received:

Payment 3 (Final):  
Amount: \$\_\_\_\_\_  
Due: \_\_\_\_\_  
Received:

## Red Flags to Watch For

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### During Discovery

- Can't articulate the problem clearly
- Unrealistic timeline expectations
- Unwilling to discuss budget
- Multiple decision makers with conflicts
- Scope keeps expanding during call
- Negative about previous providers
- Expects you to figure out their business
- Poor communication/responsiveness

### During Scoping

- Pushing back on every term
- Wants work to start before contract
- Won't pay deposit
- Vague about what they want
- Already knows exactly how to build it (micromanager)
- Requests seem to expand constantly

### Trust Your Gut

- Does this feel like a good fit?
- Are they respectful of your expertise?
- Do they value the work?
- Will this be a good reference/case study?
- Are you excited about the project?

## Go/No-Go Decision

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### Proceed If

- Clear problem to solve
- Realistic expectations
- Budget aligned
- Good communication
- Contract signed
- Deposit paid
- Your expertise matches their needs

### Decline or Refer If

- Multiple red flags
- Budget mismatch
- Outside your expertise
- Bad feeling about the client
- Scope too vague to price
- Timeline impossible

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**Next:** See [03-security-checklist.md](#) for security requirements.

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