



PRE-PROJECT CHECKLIST

Workflow Automation Delivery Framework

ENTERPRISE EDITION

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Pre-Project Checklist

Everything Before Development Begins

Lead Qualification Checklist

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

Scope of Work Checklist

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

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

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

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

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

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