

Client Fit Checklist

Use this checklist before onboarding a new client. Trust your gut—and your grid.

✓ Green Flags: Signs of a Good Fit

- They clearly understand and value the service I provide.
- They have a realistic budget and timeline for the work.
- They communicate clearly and respond in a timely manner.
- They trust my process and aren't trying to micromanage.
- They show respect—for my time, my boundaries, and my expertise.
- They're collaborative and open to professional guidance.
- Their needs align well with my current offerings.
- I feel energized and confident after speaking with them.
- I would want more clients just like them.

😞 Gut Check:

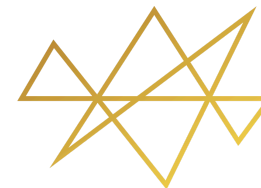
Rate the following from 1 (Nope) to 5 (Heck Yes):

- _____ I'm excited about this client and project.
- _____ I feel respected and understood.
- _____ I believe this will be a collaborative relationship.
- _____ I trust this client to follow through on their commitments.
- _____ This client aligns with the kind of business I want to build.

Total Score: _____ / 25 (Tip: Under 15? Sleep on it. Under 10? Hard pass.)

🚩 Red Flags: Proceed With Caution

- They ask for discounts or negotiate heavily on price.
- They speak negatively about all previous providers.
- Their goals are vague or unrealistic.
- They are slow to respond but demand urgency.
- They question my rates, timeline, or methods repeatedly.
- They want to "skip" parts of my process or "just do this one thing."
- There's more than one decision-maker, none of whom are on our call.
- I feel drained, uncertain, or uncomfortable after my conversation.
- I have a bad feeling about them, but can't put my finger on it.



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