

Agency Readiness Review

Allow 20-30 minutes. Agency growth is optional; start with a small pilot.

Your name / service / date:

1. Demand evidence, repeatable service and client communication:

2. Pricing, capacity, quality and process gaps to fix:

3. Decision: strengthen solo work or test one small collaboration?

Service Model and Workflow

Confirm client permission where required before sharing or delegating work.

4. Buyer, service package, deliverables, revisions and exclusions:

5. Workflow: intake, assigned task, internal review and delivery:

6. Named owners, actual deadlines and review buffer:

7. Confidentiality, limited access and ownership terms:

Pricing and Cash Timing

Count each cost once. Track management and review time as well.

8. Client fee, collaborator pay, fees, tools and other costs:

9. Your management hours and planning allowance for that time:

10. Amount before overhead and tax; is the price sustainable?

11. Client receipt dates, collaborator payment dates and reserve:

Quality Checklist and Pilot Plan

Use one small paid task before promising greater delivery capacity.

12. Pilot task, budget, deadline, success criteria and backup plan:

Final review checklist

- ☐ Confirm client permission and written scope.
- ☐ Check confidentiality and limited file access.
- ☐ Review deliverables, facts, links and file versions.
- ☐ Check style, format and asset usage permissions.
- ☐ Complete revisions before the client deadline.
- ☐ Approve final files and pay on agreed dates.
- ☐ Review actual costs, hours and client feedback.

One improvement to complete before starting the pilot:

Next: Lesson 36 - Hiring Your First Freelancer or Assistant

<https://moneyonlineers.com/hiring-your-first-freelancer-or-assistant/>