

Client Engagement Checklist

Use this workbook for a new project or ongoing support. Select the modules you need, agree the scope and owners, and revisit decisions at each review. Unselected modules create no commitment.

DONE **N/A** Tick when agreed or complete. Mark N/A where it does not apply.

Client / organisation

Project name / working title

Kick-off date

Target completion date

Client decision-maker

Project lead / day-to-day owner

01 Purpose and success

- ☐ ☐ Agree the problem to solve and the outcome this project should deliver.
- ☐ ☐ Identify the primary audience, their needs and their most important actions.
- ☐ ☐ Define measurable success, the starting point and how results will be reviewed.

Top outcome / success measure and target

Key constraints or decisions

Select the engagement

Choose only the support required. The modules describe services that may be scoped, including fractional CEO, COO, CMO or CXO-aligned support; they do not imply an appointment or unrestricted authority.

Mark selected modules below. Agree tasks, frequency, hours and approval limits before any recurring commitment. Prices are planning estimates, not automatic retainer inclusions.

- | | |
|---|----|
| ☐ A Strategy and priorities | 7 |
| ☐ B Fractional leadership and governance | 8 |
| ☐ C Operations and SOPs | 9 |
| ☐ D Sales and pipeline coordination | 10 |
| ☐ E Marketing and content coordination | 11 |
| ☐ F Customer experience and service | 12 |
| ☐ G People and team coordination | 13 |
| ☐ H Procurement and vendor coordination | 14 |
| ☐ I Finance coordination and reporting | 15 |
| ☐ J Project management and delivery | 16 |
| ☐ K Technology AI data and security | 17 |
| ☐ L Documentation admin and scheduling | 18 |
| ☐ M Website and digital project work (pages 4, 5, 20 and 21) | |

Selected modules / engagement start and end / review date

Agreed hours per cycle / hourly or retainer arrangement / spending cap

Rate: INR 1,000/hour. A retainer, minimum hours, rollover or overage arrangement applies only if separately agreed. Tasks can overlap: remove duplicated discovery, meetings or reporting before totalling.

Record approval limits for communications, spending, hiring decisions, system access and publication. Specialist advice and legal authority are separately confirmed.

Client sponsor / day-to-day owner / approval and escalation route

Discovery and scope

Create a shared picture of what is needed, what will be delivered and what should wait.

DONE **N/A** Tick when agreed or complete. Mark N/A where it does not apply.

02 Understand the starting point

- ☐ ☐ Share relevant research, current materials, feedback and examples to learn from.
- ☐ ☐ Map the main user journey or business process, including current pain points.
- ☐ ☐ List requirements and rank them as essential, useful or later.
- ☐ ☐ Identify dependencies, risks and decisions that could affect cost or timing.

03 Set the boundaries

- ☐ ☐ List the agreed deliverables, formats, quantities and review stages.
- ☐ ☐ Record what is excluded, deferred or supplied by the client or another partner.
- ☐ ☐ Agree how a new request will be assessed for cost, timing and priority before work starts.

Essential deliverables / link or name of agreed brief

Out of scope / later phase

Open decision / owner / due date

Content and experience

Make sure the project has the right material, a clear design direction and a usable experience.

DONE **N/A** Tick when agreed or complete. Mark N/A where it does not apply.

04 Prepare content and assets

- ☐ ☐ Assign owners and delivery dates for copy, images, video, data and translations.
- ☐ ☐ Provide brand assets, preferred tone, examples and any design guidelines.
- ☐ ☐ Confirm permission to use supplied content, images, fonts and testimonials.
- ☐ ☐ Check factual claims, names, contact details and any required specialist review.

05 Agree the experience

- ☐ ☐ Confirm the structure, key screens or outputs, and priority user actions.
- ☐ ☐ Agree a design direction and who will give consolidated feedback.
- ☐ ☐ Plan readable text, contrast, keyboard use, image descriptions and captions where needed.
- ☐ ☐ Choose the mobile devices, browsers or formats that must work well.

Content owner / delivery date / missing material

Design and accessibility decisions / owner / due date

Discovery and AI features

For public websites or digital products, agree how people will find information and how any AI assistance should behave. Mark other items N/A.

DONE **N/A** Tick when agreed or complete. Mark N/A where it does not apply.

06 Search and discoverability

- ☐ ☐ Identify priority topics, audience questions, pages and any location or language needs.
- ☐ ☐ Plan clear headings, page titles, descriptions and useful internal navigation.
- ☐ ☐ Confirm accurate business details and machine-readable page information where useful.
- ☐ ☐ Decide which pages should be public, searchable or private; plan redirects if replacing a site.

07 AI assistance if included

- ☐ ☐ Agree the concierge or assistant purpose, audience, supported questions and limits.
- ☐ ☐ Name approved knowledge sources and an owner to keep them accurate and current.
- ☐ ☐ Require answers grounded in approved material, with clear uncertainty and a human contact route.
- ☐ ☐ Decide what user information may be collected, where it goes and when it is deleted.
- ☐ ☐ Test inaccurate answers, unsupported requests, harmful inputs and safe escalation.

Search rankings, AI visibility and AI answers can vary. Agree what will be implemented and measured, without assuming a guaranteed result.

Feature decision / knowledge owner / review date

Delivery plan and safeguards

Assign responsibilities, make costs visible and resolve access or technical dependencies before they delay delivery.

DONE **N/A** Tick when agreed or complete. Mark N/A where it does not apply.

08 Systems and safeguards

- ☐ ☐ Confirm hosting, domains, integrations, analytics and third-party services needed.
- ☐ ☐ Identify account owners and grant only required access through a secure method.
- ☐ ☐ Agree privacy notices, consent needs, retention and any specialist security review.
- ☐ ☐ Define mobile and performance goals, expected traffic and reliable backup needs.

09 People and planning

- ☐ ☐ Confirm the project budget, currency and who approves costs before commitment.
- ☐ ☐ List setup costs and recurring services, renewal owners and expected billing arrangements.
- ☐ ☐ Agree review contacts, feedback turnaround, decision-maker and escalation route.
- ☐ ☐ Set milestones for discovery, content, design, build, review, launch and handover as applicable.

Milestone / target date / responsible person

Next milestone / target date / responsible person

Key dependency, cost decision or risk / owner / due date

A Strategy and priorities

Clarify where the business is going and turn priorities into an actionable plan.

DONE **N/A** Tick when agreed or complete. Mark N/A where it does not apply.

Planning basis: One business unit, up to three stakeholder inputs and existing business information.

Each range applies once per stated unit or cycle. Select only agreed tasks. Fee = hours x INR 1,000; these are indicative estimates, not guaranteed turnaround times.

- ☐ ☐ **Review goals and current situation**
 A short diagnostic and list of constraints.
 Per initial review | 3-5 hours | INR 3,000-5,000
 Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Frame strategic choices**
 Options, trade-offs and a recommended priority list.
 Per decision brief | 3-5 hours | INR 3,000-5,000
 Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Build a 90-day plan**
 Up to five priorities with owners and milestones.
 Per planning cycle | 3-5 hours | INR 3,000-5,000
 Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Review progress and adapt**
 One review meeting, updated priorities and actions.
 Per monthly review | 2-3 hours | INR 2,000-3,000
 Confirmed hours / fee: _____ Task owner: _____

Example measures: Priority milestones met; agreed success measures reviewed. Agree the baseline and target before measuring results.

Selected tasks / agreed cadence / module owner / approver

KPI target / evidence source / next review date

Dependencies, exclusions or decision needed / owner / date

B Fractional leadership and governance

Select the leadership support needed: CEO, COO, CMO or another CXO-aligned remit. Titles here describe optional service scope, not a claim of appointment or authority.

DONE **N/A** Tick when agreed or complete. Mark N/A where it does not apply.

Planning basis: One leadership team; one decision forum; delegated authority recorded before action.

Each range applies once per stated unit or cycle. Select only agreed tasks. Fee = hours x INR 1,000; these are indicative estimates, not guaranteed turnaround times.

- ☐ ☐ **Define the leadership remit**
Decision rights, responsibilities and escalation boundaries.
Per engagement setup | 2-4 hours | INR 2,000-4,000
Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Coordinate leadership priorities**
One agenda, meeting and assigned action summary.
Per weekly session | 2-3 hours | INR 2,000-3,000
Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Prepare a management review**
Brief dashboard and decision pack using supplied inputs.
Per monthly review | 3-5 hours | INR 3,000-5,000
Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Maintain governance and risk visibility**
Update one decision log and priority risk register.
Per monthly cycle | 2-4 hours | INR 2,000-4,000
Confirmed hours / fee: _____ Task owner: _____

Example measures: Decisions closed on time; overdue actions; priority risks with owners. Agree the baseline and target before measuring results.

Selected tasks / agreed cadence / module owner / approver

KPI target / evidence source / next review date

Dependencies, exclusions or decision needed / owner / date

C Operations and SOPs

Make repeatable work clearer, more consistent and easier to hand over.

DONE **N/A** Tick when agreed or complete. Mark N/A where it does not apply.

Planning basis: One process with up to ten main steps and two stakeholder interviews.

Each range applies once per stated unit or cycle. Select only agreed tasks. Fee = hours x INR 1,000; these are indicative estimates, not guaranteed turnaround times.

- ☐ ☐ **Map the current process**
 A simple workflow, handoffs and bottleneck list.
 Per process | 3-5 hours | INR 3,000-5,000
 Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Design the improved workflow**
 Future steps, responsibilities and control points.
 Per process | 3-5 hours | INR 3,000-5,000
 Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Write a practical SOP**
 One procedure with checklist and exception handling.
 Per SOP | 3-6 hours | INR 3,000-6,000
 Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Run an adoption review**
 One walkthrough and a consolidated update.
 Per process rollout | 2-4 hours | INR 2,000-4,000
 Confirmed hours / fee: _____ Task owner: _____

Example measures: Cycle time; avoidable errors; process adoption; unresolved bottlenecks. Agree the baseline and target before measuring results.

Selected tasks / agreed cadence / module owner / approver

KPI target / evidence source / next review date

Dependencies, exclusions or decision needed / owner / date

D Sales and pipeline coordination

Bring structure to lead handling and sales follow-through without promising revenue outcomes.

DONE **N/A** Tick when agreed or complete. Mark N/A where it does not apply.

Planning basis: One offer, one sales team and an existing lead list or CRM export.

Each range applies once per stated unit or cycle. Select only agreed tasks. Fee = hours x INR 1,000; these are indicative estimates, not guaranteed turnaround times.

- ☐ ☐ **Clarify the offer and buyer journey**
Offer summary, buyer needs and key objections.
Per offer | 3-5 hours | INR 3,000-5,000
Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Define pipeline stages and ownership**
Stage criteria and a lead follow-up checklist.
Per pipeline | 2-4 hours | INR 2,000-4,000
Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Prepare sales support material**
One brief script, email sequence or proposal outline.
Per small asset set | 3-5 hours | INR 3,000-5,000
Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Review pipeline and actions**
A prioritised follow-up list from supplied records.
Per weekly review | 1-3 hours | INR 1,000-3,000
Confirmed hours / fee: _____ Task owner: _____

Example measures: Follow-up completion; stage conversion; pipeline age; data completeness. Agree the baseline and target before measuring results.

Selected tasks / agreed cadence / module owner / approver

KPI target / evidence source / next review date

Dependencies, exclusions or decision needed / owner / date

E Marketing and content coordination

Connect audience needs, content and campaigns to agreed business priorities.

DONE **N/A** Tick when agreed or complete. Mark N/A where it does not apply.

Planning basis: One brand, one audience and up to two channels; production and ad spend separately scoped.

Each range applies once per stated unit or cycle. Select only agreed tasks. Fee = hours x INR 1,000; these are indicative estimates, not guaranteed turnaround times.

- ☐ ☐ **Set audience and messaging direction**
Audience summary, value proposition and message guide.
Per planning cycle | 3-5 hours | INR 3,000-5,000
Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Create a content plan**
One month of themes, formats, owners and dates.
Per monthly plan | 3-5 hours | INR 3,000-5,000
Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Coordinate a small campaign**
Brief, approval path and launch checklist.
Per campaign | 3-6 hours | INR 3,000-6,000
Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Review results and next actions**
Short report using agreed channel data.
Per monthly review | 2-4 hours | INR 2,000-4,000
Confirmed hours / fee: _____ Task owner: _____

Example measures: Qualified enquiries; content delivery; conversion; campaign cost where available. Agree the baseline and target before measuring results.

Selected tasks / agreed cadence / module owner / approver

KPI target / evidence source / next review date

Dependencies, exclusions or decision needed / owner / date

F Customer experience and service

Improve the experience from enquiry through onboarding, support and retention.

DONE **N/A** Tick when agreed or complete. Mark N/A where it does not apply.

Planning basis: One customer journey, up to five sample feedback items and one service team.

Each range applies once per stated unit or cycle. Select only agreed tasks. Fee = hours x INR 1,000; these are indicative estimates, not guaranteed turnaround times.

- ☐ ☐ **Map the customer journey**
 Touchpoints, friction and priority improvement list.
 Per journey | 3-5 hours | INR 3,000-5,000
 Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Prepare customer onboarding**
 One welcome sequence and onboarding checklist.
 Per journey | 3-5 hours | INR 3,000-5,000
 Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Define service and escalation steps**
 Response ownership, common replies and escalation rules.
 Per service workflow | 2-4 hours | INR 2,000-4,000
 Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Review feedback and service issues**
 Theme summary and assigned improvement actions.
 Per monthly review | 2-3 hours | INR 2,000-3,000
 Confirmed hours / fee: _____ Task owner: _____

Example measures: Response time; resolution time; recurring issues; satisfaction feedback. Agree the baseline and target before measuring results.

Selected tasks / agreed cadence / module owner / approver

KPI target / evidence source / next review date

Dependencies, exclusions or decision needed / owner / date

G People and team coordination

Help the team understand responsibilities and follow through on agreed work.

DONE **N/A** Tick when agreed or complete. Mark N/A where it does not apply.

Planning basis: One team of up to eight people; management coordination rather than employment or legal advice.

Each range applies once per stated unit or cycle. Select only agreed tasks. Fee = hours x INR 1,000; these are indicative estimates, not guaranteed turnaround times.

- ☐ ☐ **Clarify roles and responsibilities**
 A responsibility map and key handoff expectations.
 Per team setup | 3-5 hours | INR 3,000-5,000
 Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Coordinate onboarding and handover**
 One role checklist and required access/training list.
 Per role | 2-4 hours | INR 2,000-4,000
 Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Facilitate team planning**
 One meeting, workload view and action summary.
 Per weekly session | 1-3 hours | INR 1,000-3,000
 Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Coordinate learning and feedback actions**
 Agreed development actions and follow-up dates.
 Per monthly cycle | 2-4 hours | INR 2,000-4,000
 Confirmed hours / fee: _____ Task owner: _____

Example measures: Ownership clarity; action completion; onboarding readiness; dependency delays. Agree the baseline and target before measuring results.

Selected tasks / agreed cadence / module owner / approver

KPI target / evidence source / next review date

Dependencies, exclusions or decision needed / owner / date

H Procurement and vendor coordination

Make requirements, comparisons and supplier follow-through easier to review.

DONE **N/A** Tick when agreed or complete. Mark N/A where it does not apply.

Planning basis: One purchase requirement and comparison of up to three client-approved suppliers.

Each range applies once per stated unit or cycle. Select only agreed tasks. Fee = hours x INR 1,000; these are indicative estimates, not guaranteed turnaround times.

- ☐ ☐ **Prepare the vendor brief**
 Requirements, scope, selection criteria and constraints.
 Per requirement | 2-4 hours | INR 2,000-4,000
 Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Compare received proposals**
 Side-by-side scope, price and risk summary.
 Per comparison | 3-5 hours | INR 3,000-5,000
 Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Coordinate supplier onboarding**
 Deliverables, contacts, approvals and access checklist.
 Per supplier | 2-4 hours | INR 2,000-4,000
 Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Track supplier delivery and renewals**
 One status review and exceptions/renewal log.
 Per monthly cycle | 1-3 hours | INR 1,000-3,000
 Confirmed hours / fee: _____ Task owner: _____

Example measures: Approval turnaround; delivery reliability; renewal visibility; issue closure. Agree the baseline and target before measuring results.

Selected tasks / agreed cadence / module owner / approver

KPI target / evidence source / next review date

Dependencies, exclusions or decision needed / owner / date

I Finance coordination and reporting

Organise business financial inputs and management reporting. Accounting, audit, tax, investment and other regulated advice remain with qualified professionals.

DONE **N/A** Tick when agreed or complete. Mark N/A where it does not apply.

Planning basis: One business unit, one reporting period and clean client-provided figures; no bank transactions.

Each range applies once per stated unit or cycle. Select only agreed tasks. Fee = hours x INR 1,000; these are indicative estimates, not guaranteed turnaround times.

☐ ☐ **Build a budget coordination template**

Categories, owner inputs and approval dates.

Per setup | 3-5 hours | INR 3,000-5,000

Confirmed hours / fee: _____ Task owner: _____

☐ ☐ **Prepare a budget versus actual view**

One comparison and questions for the finance owner.

Per monthly report | 2-4 hours | INR 2,000-4,000

Confirmed hours / fee: _____ Task owner: _____

☐ ☐ **Coordinate invoice and payment follow-ups**

Status tracker and approved follow-up actions.

Per weekly cycle | 1-3 hours | INR 1,000-3,000

Confirmed hours / fee: _____ Task owner: _____

☐ ☐ **Prepare management reporting inputs**

One summary from supplied figures and assumptions.

Per monthly pack | 3-5 hours | INR 3,000-5,000

Confirmed hours / fee: _____ Task owner: _____

Example measures: Report timeliness; budget variance; invoice follow-up status; missing inputs. Agree the baseline and target before measuring results.

Selected tasks / agreed cadence / module owner / approver

KPI target / evidence source / next review date

Dependencies, exclusions or decision needed / owner / date

J Project management and delivery

Keep scope, dependencies, decisions and delivery progress visible.

DONE **N/A** Tick when agreed or complete. Mark N/A where it does not apply.

Planning basis: One project with up to ten workstreams or major deliverables and one consolidated status forum.

Each range applies once per stated unit or cycle. Select only agreed tasks. Fee = hours x INR 1,000; these are indicative estimates, not guaranteed turnaround times.

- ☐ ☐ **Create the delivery plan**
 Deliverables, dependencies, milestones and owners.
 Per project setup | 3-6 hours | INR 3,000-6,000
 Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Maintain delivery status**
 One status update, blocker review and action list.
 Per weekly cycle | 2-4 hours | INR 2,000-4,000
 Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Assess a change request**
 Impact on scope, effort, timing and dependencies.
 Per change | 1-3 hours | INR 1,000-3,000
 Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Coordinate acceptance and closeout**
 Evidence checklist, open items and handover plan.
 Per project closure | 2-4 hours | INR 2,000-4,000
 Confirmed hours / fee: _____ Task owner: _____

Example measures: Milestone reliability; overdue actions; open blockers; approved scope changes. Agree the baseline and target before measuring results.

Selected tasks / agreed cadence / module owner / approver

KPI target / evidence source / next review date

Dependencies, exclusions or decision needed / owner / date

K Technology AI data and security

Select practical technology improvements with clear human oversight, data boundaries and ownership.

DONE **N/A** Tick when agreed or complete. Mark N/A where it does not apply.

Planning basis: One bounded workflow and existing approved tools; implementation depth is separately scoped.

Each range applies once per stated unit or cycle. Select only agreed tasks. Fee = hours x INR 1,000; these are indicative estimates, not guaranteed turnaround times.

- ☐ ☐ **Review tools and workflow needs**
 Current tool map and prioritised improvement options.
 Per workflow | 3-5 hours | INR 3,000-5,000
 Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Plan a bounded AI or automation pilot**
 Use case, approved data, success test and human review.
 Per pilot design | 3-6 hours | INR 3,000-6,000
 Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Define a reporting or data workflow**
 Sources, ownership, quality checks and output outline.
 Per workflow | 3-5 hours | INR 3,000-5,000
 Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Coordinate an access and resilience review**
 Access owners, backup checks and specialist review needs.
 Per review cycle | 2-4 hours | INR 2,000-4,000
 Confirmed hours / fee: _____ Task owner: _____

Example measures: Time saved against baseline; error rate; review coverage; access issues closed. Agree the baseline and target before measuring results.

Selected tasks / agreed cadence / module owner / approver

KPI target / evidence source / next review date

Dependencies, exclusions or decision needed / owner / date

L Documentation admin and scheduling

Keep everyday coordination organised and information easy to find.

DONE **N/A** Tick when agreed or complete. Mark N/A where it does not apply.

Planning basis: One team workspace, up to five documents or one meeting cycle; volume agreed before recurring work.

Each range applies once per stated unit or cycle. Select only agreed tasks. Fee = hours x INR 1,000; these are indicative estimates, not guaranteed turnaround times.

- ☐ ☐ **Organise documents and records**
 A folder/index structure, naming rules and owner list.
 Per small workspace | 2-4 hours | INR 2,000-4,000
 Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Prepare meeting coordination**
 Agenda, supplied materials and action notes.
 Per meeting cycle | 1-2 hours | INR 1,000-2,000
 Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Coordinate schedules and follow-ups**
 A consolidated schedule and confirmed next actions.
 Per weekly cycle | 1-3 hours | INR 1,000-3,000
 Confirmed hours / fee: _____ Task owner: _____
- ☐ ☐ **Maintain recurring admin visibility**
 Renewal, compliance-input or reporting date tracker.
 Per monthly cycle | 1-3 hours | INR 1,000-3,000
 Confirmed hours / fee: _____ Task owner: _____

Example measures: Documents current; scheduling conflicts; action turnaround; renewal dates tracked. Agree the baseline and target before measuring results.

Selected tasks / agreed cadence / module owner / approver

KPI target / evidence source / next review date

Dependencies, exclusions or decision needed / owner / date

Agree the selected work

Use only selected tasks to build the engagement estimate. Attach extra rows if needed. Group recurring work by the same billing period before adding it up.

Selected tasks and effort

Enter module/task references, the deliverable, number of units or cycles and confirmed hours per unit. Include the website baseline only if selected; remove any overlapping tasks.

Module / task and deliverable	Units / cycle	Hours / unit	Total hours

Task hours = units x hours per unit. Task fee = total hours x INR 1,000.

One-time labour hours: _____ Fee INR: _____ Scope reference: _____

Recurring labour hours: _____ per _____ Fee INR: _____ per _____

External costs and approvals

External costs are billed at actuals, as scoped and approved. Separate each billing period. Include only approved items; obtain approval before purchases, renewals or cost increases.

Cost	One-time / period	Estimate INR	Approval / date	Actual INR
Hosting				
Domain				
API usage				
Licences				
Other				

One-time external estimate INR: _____ Recurring estimate INR: _____ per _____

One-time total before tax = one-time labour + external estimate: INR _____

Recurring total before tax = recurring labour + external costs: INR _____ per _____

Tax treatment / amount: _____ To be confirmed.

Agreed cap INR: _____ Reviewed by / date: _____

Confirm review frequency, unused hours, extra work and end/renewal arrangements separately. Scope changes require a revised estimate and approval before proceeding.

Website scope time and cost

Indicative planning worksheet at INR 1,000/hour. Confirm the project-specific scope and estimate before work starts. These ranges are not a fixed quote.

Baseline: a new brochure website of up to 5 pages, one language, client-supplied final copy and licensed assets, using a simple design system. No ecommerce, CMS, migration, custom integrations or AI assistant.

10 Labour estimate for this baseline

Task and included scope	Hours	Fee INR	Client hours / fee
Discovery and scope confirmation	2-3	2,000-3,000	
Page structure and supplied copy review	2-3	2,000-3,000	
Visual direction and layout design	4-6	4,000-6,000	
Responsive build of up to 5 pages	8-12	8,000-12,000	
Basic search titles and descriptions	2-3	2,000-3,000	
Testing and one consolidated fix round	4-6	4,000-6,000	
Launch and handover walkthrough	2-3	2,000-3,000	
TOTAL BASELINE LABOUR	24-36	24,000-36,000	

Ranges are active labour hours, not delivery days. Feedback, content readiness, access and approvals affect elapsed time. The fix round is included once; new scope is re-estimated.

Optional work, scoped separately: copywriting, extra languages/pages, CMS, ecommerce, migration, custom integrations, advanced SEO, AI concierge and ongoing support.

Optional scope / hours / fee: _____

Elapsed schedule: start _____ finish _____ Key dependency: _____

11 External costs and confirmed totals

Billed at actuals, as scoped and approved. Obtain approval before commitment. Enter the billing period for recurring costs; blank amounts are not zero.

Cost	One-time / period	Estimate INR	Approval / date	Actual INR
Hosting				
Domain				
API usage				
Licences				
Other				

Confirmed labour: _____ hours x INR 1,000 = INR _____ (including optional work).

External: one-time INR _____ Recurring INR _____ per _____ Tax: to be confirmed.

Website total before tax: labour + one-time external costs = INR _____

Tax treatment / amount: _____ Reviewed by / date: _____

Review launch and handover

Use this page again before release. Keep unresolved items visible and make the next decision explicit.

DONE **N/A** Tick when agreed or complete. Mark N/A where it does not apply.

12 Confirm readiness

- ☐ ☐ Review each agreed deliverable against the scope and acceptance criteria.
- ☐ ☐ Test key journeys, forms, links, accessibility, mobile use and performance as applicable.
- ☐ ☐ Verify content, permissions, analytics and integrations; record issues and retest fixes.
- ☐ ☐ Agree remaining issues, their impact and whether they must be fixed before release.
- ☐ ☐ Name the release approver and confirm the launch date, communications and support contact.
- ☐ ☐ Save a recoverable backup and agree who can restore the previous version if needed.
- ☐ ☐ Hand over files, documentation, training and account ownership; remove unneeded access.
- ☐ ☐ Confirm recurring reviews, support owners, renewal responsibilities and the next review date.

13 Record the decision

Acceptance means the agreed outputs have been reviewed against the recorded criteria. Note any exceptions and next steps below.

- ☐ Ready to proceed ☐ Proceed with noted actions ☐ Revisit

Reviewed by / date / next review date

Outstanding action / owner / due date
