MIA SPENCER ADVISORY

Confirm scope and onboarding

Before you sign or hand over the work

Mark each item as open or agreed. Record the written commitment, owner, and date.

Business / project: _____ Date: _____

Scope of work

List deliverables, due dates, exclusions, and review meetings.

Status: Open / Agreed Owner and date: _____

Fees and changes

Confirm pricing, billing dates, and approval for additional work.

Status: Open / Agreed Owner and date: _____

Access and records

Name who handles access, file transfer, and prior records.

Status: Open / Agreed Owner and date: _____

First month

Agree on first milestones, client inputs, and the first review meeting.

Status: Open / Agreed Owner and date: _____

Escalation and exit

Name contacts for problems and agree how records will be returned.

Status: Open / Agreed Owner and date: _____

Open decisions and who will resolve them

Keep your completed worksheet for your own planning.