

Client/project checklist

Purpose

We've always had a framework in place to review if an upcoming client or project will fit our company, but been a 80/20 approach. Besides just raw data (e.g. budget), we also have a gut feeling and it was something we couldn't ignore. The entrepreneur inside us saw opportunities: "This can grow into so much more" or "This has many advantages for our team".

But we needed more insight in the 'why'. Why are we turning down a seemingly good client? Why do we accept a project that seems to be a long shot? We decided to form a checklist that would give us more insight, help us ask the right questions, and provide guidance in making choices.

This document refers to 'client' for convenience, but this could be substituted by 'project'.

The most ideal result of this checklist is to see if:

- There's a match on multiple levels (**product, team, company and budget**).
- We share the same values (we've defined in our mission/vision document).

The checklist also prepares us beforehand. It helps us find specific traits (or matches in values) during initial conversations with a prospect. It helps us develop leverage and steers us toward a positive checklist outcome. This is not only good for our company, but also for our team and our client.

Areas of interest

The areas we're most interested in are:

- **Product** - Do we match with the client on product level?
- **Team** - What will our team get out of it?
- **Company** - How will the project benefit Awkward?
- **Budget** - What is our financial gain?

Every area consists of a set of criteria that forces us to think about different aspects of the project.

Product

The following criteria are mostly related to (working on) the product.

Do we consider the product to be of high potential?

Freedom of creativity

Is it possible to work on the product with freedom of creativity? Can we operate without being too restrained to certain boundaries?

Inspire and motivate

Using the finished product, will we be able to inspire and motivate others?

Improve people's lives

Will the product contribute to the world and increase quality of life? This should be viewed in a broad sense; we're not saving the world.

Challenging

Is the product challenging (enough)? Will it make a difference when finished? Does the project encourage us to step outside of our comfort zone?

Feasibility

Is it realistic to finish the product and is there even a chance the product will work? Is the global idea feasible enough to ensure a viable outcome?

Team

Apart from product, it's important to be aligned on a team level.

What's the possible impact on the team when taking on a client/
product?

Happiness

Will working on the product make members of our team happy? Or
is there a meh-factor we should worry about?

Committing

Would the team see the product as something they would like to
commit to? Will they be able to commit to it for the duration of the
project? Or maybe even after that?

Challenging

Is the project challenging enough? Will the team be able to
challenge itself? How can we make the product challenging to work
on?

Pride

Would we be proud to have worked on the product? Would it be
something to talk about on birthday parties or in bars/at meetups?
What will we learn from the project? Will we be able to use our
newfound knowledge for next projects?

Collaboration

Will working with the client be fun? Do our teams have multiple values in common? Is the client open to working together as equals? Open to working in a standard client-contractor relationship?

Inspiration

Are we going to be able to inspire ourselves. Is there enough freedom to work on unknown components?

Grow

Is it possible for us as a team (or members individually) to grow as experts in a certain field? To become experts in new tech. Can we gather domain-specific knowledge, which could help us further down the road?

Company

Company is an area that's important to us. What is needed to take the next steps as a company.

Duration

Is the duration of the project short-term or long-term? Will it require a heavy commitment or is a project with lower impact?

Scope

How big is the project? Should we assign a product team or one or two people? Are we talking about a design sprint or a full-fledged project?

Phase

In what phase is the project? Foundation, still figuring out direction, what the product is going to be? Or is it already post-mvp? What implications and requirements does that bring?

Image

Will working on the product enable us to communicate it to our audience? Will it improve the Awkward image? Could it potentially be used as a selling channel to attract new clients?

Vision

Does the product match our vision or does it complement what we stand for as a company? Could the project be a logical (or illogical) way to be part of our strategy supporting our mission?

Domain-specific knowledge

Do we have domain-specific knowledge (e.g. email, payments, m-commerce, image/asset sharing) which will boost the project or give us an advantage?

Authority

Will the product assist or enable us to become an authority in a certain field? Think of:

- Fashion apps
- Music apps
- Email
- Content (more global)
- M-commerce

Budget

Lastly, the budget. This will consist of raw criteria we should consider when deciding to take on a client (or not).

Earnings

Is the project purely getting paid for by the client? Does it need an investment by Awkward and/or is there a certain risk involved?

Opportunity

Will lowering our budget create certain opportunities? Either in long-term commitment or equity/share in the final product?

Scope

Is the budget broad enough and does it support to “push things forward” and “bring out the best”? Should we limit the scope of what’s achievable?

Costs

Do we have to make costs ourselves? Think of tools, outside expertise, supplies/devices to test on?

Realistic

Is the overall budget realistic enough to be able to deliver a top-notch product? Can we fulfill the clients expectations and surpass our reputation?

Template checklist

Rating could contain ++/+/ø/-/-- or be empty. Comments can provide additional information specific to the project

Awkward client checklist	Rating	Comments
Product		
Freedom of creativity		
Inspire and motivate		
Improve peoples lives		
Challenging		
Feasibility		
Team		
Happiness		
Committing		
Challenging		
Pride		
Collaboration		
Inspire ourselves		
Grow		
Company		
Duration		
Scope		
Phase		
Image		
Vision		
Domain-specific knowledge		
Authority		
Budget		
Earnings		
Opportunity		
Scope		
Costs		
Realistic		

Conclusion

- Has overall conclusion based on 4 focus groups (product/team/company/budget).
- What are the Strengths/Weaknesses/Opportunities/Threats?
- Do we match and share the same values as defined in our mission/vision? Why or why not? Are there special circumstances?
- Yes... or No?



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