

New Customer Checklist

Date of initial enquiry: _____

Quote provided? (circle) **Y** **N**

Quote accepted? **Y** **N**

Have I explained my terms? **Y** **N**

Did they agree to my terms? **Y** **N**

How keen do they sound? **Not really** **Pretty keen** **Super keen**

How quickly do they respond? **Days** **Next day** **Same day**

What does my gut tell me? **I'm worried** **Should be fine** **They will definitely pay**

Have I? (tick if done)

Googled them: _____

Checked ABR: (if a business) _____

Phoned some references (if available): _____

Asked who will be responsible for paying me: _____

Sent them a New Customer Engagement form: _____

Received the NCC back completed: _____

Asked for a deposit up front: _____

REMEMBER: **Always look after number 1. Every customer is a risk.**