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FREE OPS PACK

The Agency Ops Pack

The paperwork that keeps a small agency clean: a client intake form, a checklist for vetting a web-design agency, and a quote-to-cash tracker so no invoice slips.

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|----|------------------------------------|---------------------------|
| 01 | Client intake form | Start every project right |
| 02 | Web-design hiring checklist | Vet before you sign |
| 03 | Quote-to-cash tracker | Get paid on time |
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By Gaurav Tiwari, CEO of Gatilab. The ops sheets behind 800+ client projects. Pairs with the SOP Starter Kit.

Client Intake Form

Start every project right

Send this before kickoff. The answers here prevent 80% of the misunderstandings that blow up a project later.

BUSINESS / BRAND

MAIN CONTACT + EMAIL

WHAT ARE WE BUILDING?

DEADLINE / LAUNCH DATE

BUDGET RANGE

WHO SIGNS OFF?

PRIMARY GOAL (WHAT DOES SUCCESS LOOK LIKE?)

TARGET AUDIENCE

DELIVERABLES EXPECTED

BRAND ASSETS AVAILABLE (LOGO, GUIDELINES, COPY?)

COMPETITORS / SITES YOU LIKE

ANYTHING TO AVOID?

Web-Design Agency Hiring Checklist

Vet before you sign

Hiring the agency, or being hired? Either way, a yes to these is what separates a smooth project from a lawsuit. Tick before money changes hands.

PROOF & FIT

- ☐ Portfolio with work like yours
- ☐ Two references you actually call
- ☐ Clear, written process
- ☐ Scope defined in specifics, not vibes
- ☐ Realistic timeline with milestones

BUILD QUALITY

- ☐ Mobile-first, responsive
- ☐ Fast by default (Core Web Vitals)
- ☐ SEO-ready structure
- ☐ Accessibility considered (WCAG)
- ☐ You own the code + accounts

MONEY & TERMS

- ☐ Transparent, itemized pricing
- ☐ Payment tied to milestones
- ☐ Change-order process in writing
- ☐ Post-launch support defined
- ☐ Signed contract before work starts

— GREEN LIGHT WHEN

Scope, ownership, timeline, and payment milestones are all in writing, and the references checked out.

Quote-to-Cash Tracker

Get paid on time

Cash leaks between "they said yes" and "the money landed." This one sheet closes the gap: log every quote and chase every invoice on time.

CLIENT	QUOTE SENT	AMOUNT	ACCEPTED?	INVOICE SENT	DUE DATE	PAID?

The follow-up is the job. Set the due date the moment you invoice, and chase the day it's late, politely, in writing. Most late payments are forgotten, not refused.