Client Onboarding Checklist

Free Client Onboarding Checklist with AI customization. Industry-specific guidance for client onboarding checklist. Build your checklist now.

Initial Client Contact

- ☐ Send welcome email with introduction
- ☐ Schedule kickoff meeting
- ☐ Send client onboarding packet
- ☐ Provide service agreement
- ☐ Share project timeline
- ☐ Introduce key team members
- ☐ Set communication expectations
- ☐ Explain next steps
- ☐ Provide contact information
- ☐ Send calendar invites
- ☐ Share resource links
- ☐ Confirm receipt of materials

Documentation & Agreements

- ☐ Review and sign service contract
- ☐ Complete client information form
- ☐ Gather billing information
- ☐ Set up payment terms
- ☐ Sign NDAs if required
- ☐ Review SLAs
- ☐ Confirm project scope
- ☐ Document special requirements
- ☐ Establish success metrics
- ☐ Set milestone dates
- ☐ Define deliverables
- ☐ Approve terms and conditions

Account Setup

- ☐ Create client account in CRM
- ☐ Set up client portal access
- ☐ Configure billing system
- ☐ Create project in PM tool
- ☐ Set up communication channels
- ☐ Establish file sharing system
- ☐ Create client folder structure
- ☐ Set up reporting dashboard

- [ ] Configure notification preferences
- [ ] Grant appropriate permissions
- [ ] Test all access points
- [ ] Document login credentials

Discovery & Requirements

- [ ] Conduct needs assessment
- [ ] Document business goals
- [ ] Identify key stakeholders
- [ ] Map current processes
- [ ] Define success criteria
- [ ] Gather brand assets
- [ ] Review existing materials
- [ ] Identify pain points
- [ ] Understand target audience
- [ ] Assess technical requirements
- [ ] Document preferences
- [ ] Create requirements document

Team Introduction

- [ ] Schedule team introduction call
- [ ] Share team member roles
- [ ] Provide team bios
- [ ] Explain escalation path
- [ ] Define points of contact
- [ ] Share communication protocols
- [ ] Set response time expectations
- [ ] Establish meeting cadence
- [ ] Create contact sheet
- [ ] Set up team channels
- [ ] Share out-of-office protocols
- [ ] Define emergency contacts

Project Planning

- [ ] Create detailed project plan
- [ ] Set project milestones
- [ ] Define phase gates
- [ ] Establish review cycles
- [ ] Schedule regular check-ins
- [ ] Set deadline expectations
- [ ] Create task assignments
- [ ] Define approval process
- [ ] Document dependencies
- [ ] Identify risks
- [ ] Plan contingencies

- [ ] Share project roadmap

Communication Setup

- [ ] Establish preferred channels
- [ ] Set meeting schedule
- [ ] Create status report format
- [ ] Define escalation process
- [ ] Set response time SLAs
- [ ] Schedule regular reviews
- [ ] Create feedback loops
- [ ] Establish change request process
- [ ] Set up notification system
- [ ] Document communication plan
- [ ] Share emergency procedures
- [ ] Test communication channels

Training & Education

- [ ] Provide platform training
- [ ] Share best practices guide
- [ ] Conduct tool walkthrough
- [ ] Explain processes
- [ ] Provide documentation
- [ ] Schedule Q&A sessions
- [ ] Create training materials
- [ ] Record training sessions
- [ ] Share video tutorials
- [ ] Provide quick reference guides
- [ ] Set up support channels
- [ ] Schedule follow-up training

Quality Assurance

- [ ] Review quality standards
- [ ] Set performance metrics
- [ ] Establish KPIs
- [ ] Create feedback mechanism
- [ ] Schedule quality reviews
- [ ] Define acceptance criteria
- [ ] Set revision process
- [ ] Document quality expectations
- [ ] Create issue tracking
- [ ] Establish resolution process
- [ ] Plan continuous improvement
- [ ] Schedule performance reviews

Launch Preparation

- ☐ Confirm all setup complete
- ☐ Test all systems
- ☐ Verify access working
- ☐ Review first deliverables
- ☐ Confirm team readiness
- ☐ Double-check requirements
- ☐ Validate timelines
- ☐ Approve initial work
- ☐ Schedule launch call
- ☐ Prepare launch materials
- ☐ Set go-live date
- ☐ Celebrate partnership kickoff