New Client Onboarding Checklist Template

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

Client Information

- ☐ Company name: ________________
- ☐ Primary contact: ________________
- ☐ Email address: ________________
- ☐ Phone number: ________________
- ☐ Address: ________________
- ☐ Industry: ________________
- ☐ Company size: ________________
- ☐ Start date: ________________
- ☐ Account manager: ________________
- ☐ Success manager: ________________
- ☐ Support contact: ________________
- ☐ Special requirements: ________________

Welcome Phase

- ☐ Send welcome email %¡ Date: ________
- ☐ Schedule kickoff call %¡ Date: ________
- ☐ Send onboarding packet %¡ Date: ________
- ☐ Introduce team members %¡ Date: ________
- ☐ Share timeline %¡ Date: ________
- ☐ Set expectations %¡ Date: ________
- ☐ Provide resources %¡ Date: ________
- ☐ Get initial feedback %¡ Date: ________

Contract & Legal

- ☐ Service agreement signed %¡ Date: ________
- ☐ Terms accepted %¡ Date: ________
- ☐ NDA executed %¡ Date: ________
- ☐ SLA agreed %¡ Date: ________
- ☐ Payment terms set %¡ Date: ________
- ☐ Billing information %¡ Date: ________
- ☐ Insurance verified %¡ Date: ________
- ☐ Compliance confirmed %¡ Date: ________

Discovery Session

- ☐ Business goals: ________________
- ☐ Success metrics: ________________
- ☐ Current challenges: ________________
- ☐ Target audience: ________________
- ☐ Competition: ________________
- ☐ Budget range: ________________
- ☐ Timeline expectations: ________________
- ☐ Decision makers: ________________
- ☐ Approval process: ________________
- ☐ Communication preferences: ________________

Account Configuration

- ☐ Create client account %¡ ID: ________
- ☐ Set up portal access %¡ URL: ________
- ☐ Configure permissions %¡ Done: ________
- ☐ Customize settings %¡ Done: ________
- ☐ Brand customization %¡ Done: ________
- ☐ Integration setup %¡ Done: ________
- ☐ Data import %¡ Done: ________
- ☐ Testing complete %¡ Done: ________

Team Assignment

- ☐ Account manager: ________________
- ☐ Project manager: ________________
- ☐ Technical lead: ________________
- ☐ Support contact: ________________
- ☐ Escalation contact: ________________
- ☐ Executive sponsor: ________________
- ☐ Additional team: ________________

Training Plan

- ☐ Training needs assessment %¡ Date: ________
- ☐ Schedule sessions %¡ Dates: ________
- ☐ Prepare materials %¡ Done: ________
- ☐ Conduct training %¡ Done: ________
- ☐ Record sessions %¡ Done: ________
- ☐ Provide documentation %¡ Done: ________
- ☐ Follow-up scheduled %¡ Date: ________
- ☐ Certification planned %¡ Date: ________

Communication Plan

☐ Regular meeting schedule: ________________
☐ Status report frequency: ________________
☐ Preferred channels: ________________
☐ Escalation process: ________________
☐ Emergency contacts: ________________
☐ Out-of-hours support: ________________
☐ Response time SLAs: ________________

Project Planning

☐ Project scope defined %¡ Date: ________
☐ Timeline created %¡ Date: ________
☐ Milestones set %¡ Date: ________
☐ Resources allocated %¡ Date: ________
☐ Risks identified %¡ Date: ________
☐ Success criteria %¡ Date: ________
☐ Review schedule %¡ Date: ________

Success Metrics

☐ KPIs defined: ________________
☐ Baseline measured: ________________
☐ Targets set: ________________
☐ Tracking method: ________________
☐ Review frequency: ________________
☐ Reporting format: ________________
☐ Success plan created %¡ Date: ________

Go-Live Checklist

☐ All setup complete %¡ Date: ________
☐ Training complete %¡ Date: ________
☐ Data migrated %¡ Date: ________
☐ Integrations tested %¡ Date: ________
☐ Users activated %¡ Date: ________
☐ Support ready %¡ Date: ________
☐ Launch date: ________________
☐ Post-launch review: ________________

Sign-Off

☐ Client approval: ________________
☐ Date: ________________
☐ Account manager: ________________
☐ Date: ________________
☐ Notes: ________________