

Client Onboarding Master Checklist

One master workflow from signed client to a stable first week of delivery.

PHASE 1 - CLIENT SAYS YES

- ☐ Confirm service / scope
- ☐ Confirm price and payment terms
- ☐ Confirm start date
- ☐ Send contract / agreement
- ☐ Send invoice / payment instructions

PHASE 2 - WELCOME

- ☐ Send welcome email
- ☐ Send intake questionnaire
- ☐ Send access request checklist
- ☐ Send kickoff call details
- ☐ Create client record in CRM / tracker

PHASE 3 - SETUP

- ☐ Create client folder structure
- ☐ Create project workspace
- ☐ Create communication channel
- ☐ Add milestones and deadlines
- ☐ Store signed agreement and key documents

PHASE 4 - ACCESS

- ☐ Request required tools / accounts
- ☐ Verify permissions
- ☐ Document access method
- ☐ Flag missing access
- ☐ Confirm privacy / security requirements

PHASE 5 - KICKOFF

- ☐ Review business context
- ☐ Confirm goals and success metrics
- ☐ Confirm responsibilities and boundaries
- ☐ Confirm workflow and approvals
- ☐ Confirm first deliverables
- ☐ Document risks and dependencies
- ☐ Assign action items

PHASE 6 - FIRST WEEK

- ☐ Review existing assets / data
- ☐ Audit current process
- ☐ Prepare initial plan
- ☐ Start first approved deliverable

- ☐ Send first weekly update
- ☐ Confirm next-week priorities

PHASE 7 - ONBOARDING COMPLETE

- ☐ All critical access received
- ☐ Client knows where communication happens
- ☐ Client knows approval process
- ☐ Scope is documented
- ☐ Reporting cadence is active
- ☐ First deliverable is underway
- ☐ Outstanding onboarding issues logged

ONBOARDING STATUS

FIELD	DETAILS
Client	
Start Date	
Onboarding Owner	
Kickoff Date	
Current Status	Not Started / In Progress / Complete
Outstanding Items	
Next Action	