

# A clear first week.

## Client onboarding checklist

Adapt these ten steps to your business. Give each task an owner and a due date. Keep a note of anything missing or needing a decision.

Client: \_\_\_\_\_

Project: \_\_\_\_\_

| Done                     | Task                                                | Owner | Due date | Notes |
|--------------------------|-----------------------------------------------------|-------|----------|-------|
| <input type="checkbox"/> | 1. Agree the scope and engagement                   |       |          |       |
| <input type="checkbox"/> | 2. Assign the client contact and project owner      |       |          |       |
| <input type="checkbox"/> | 3. Collect the required client information          |       |          |       |
| <input type="checkbox"/> | 4. Check information and agree any exceptions       |       |          |       |
| <input type="checkbox"/> | 5. Request the documents or files needed            |       |          |       |
| <input type="checkbox"/> | 6. Create the client and project records            |       |          |       |
| <input type="checkbox"/> | 7. Set up agreed access and shared folders          |       |          |       |
| <input type="checkbox"/> | 8. Confirm billing details and agreed terms         |       |          |       |
| <input type="checkbox"/> | 9. Book the kickoff and confirm next steps          |       |          |       |
| <input type="checkbox"/> | 10. Confirm readiness to start and send the welcome |       |          |       |

### Make it useful for your business.

Add the checks and approvals your business requires. Share client-facing steps separately from internal notes. For an editable version, use the free checklist and CSV downloads online.

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## A completed example

Fictional client: Marlow Studio. Project: Website refresh. Four steps complete, with the remaining owners and deadlines agreed.

Client: Marlow Studio (fictional)

Project: Website refresh

| Done | Task                                                | Owner        | Due date | Notes                 |
|------|-----------------------------------------------------|--------------|----------|-----------------------|
| Yes  | 1. Agree the scope and engagement                   | Founder      | 6 Oct    |                       |
| Yes  | 2. Assign the client contact and project owner      | Project lead | 6 Oct    |                       |
| Yes  | 3. Collect the required client information          | Founder      | 7 Oct    |                       |
| Yes  | 4. Check information and agree any exceptions       | Project lead | 7 Oct    |                       |
| No   | 5. Request the documents or files needed            | Founder      | 8 Oct    | Brand files requested |
| No   | 6. Create the client and project records            | Project lead | 8 Oct    |                       |
| No   | 7. Set up agreed access and shared folders          | Founder      | 9 Oct    |                       |
| No   | 8. Confirm billing details and agreed terms         | Project lead | 9 Oct    |                       |
| No   | 9. Book the kickoff and confirm next steps          | Founder      | 12 Oct   | Confirm availability  |
| No   | 10. Confirm readiness to start and send the welcome | Project lead | 12 Oct   |                       |

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