

CLIENT ONBOARDING CHECKLIST

From signed contract to first deliverable

Before kickoff (days 1 to 3)

- ☐ Statement of work signed by both sides
- ☐ Deposit invoice sent and paid
- ☐ Welcome email sent (template below)
- ☐ Client contact and final approver named
- ☐ Access requested: domain, hosting, analytics, social, brand files
- ☐ Shared folder created and shared
- ☐ Kickoff call booked

Kickoff call (45 to 60 minutes)

- ☐ Goals: what does success look like in 3 months?
- ☐ Scope: walk through deliverables and what is out of scope
- ☐ Timeline: dates and the client steps each one depends on
- ☐ Communication: one channel, response times, weekly update day
- ☐ Approvals: who signs off, how many review rounds
- ☐ Next steps: who does what this week

First week

- ☐ Kickoff notes sent within 24 hours
- ☐ Project plan with dates shared
- ☐ All access confirmed working
- ☐ First update sent on the agreed day

First 30 days

- ☐ First deliverable delivered
- ☐ Check-in: "Is this going the way you expected?"
- ☐ Invoice for the first milestone sent
- ☐ Ask for a short testimonial if things are going well

Welcome email

Subject: Welcome aboard, next steps for [project]

Hi [name],

Thanks for signing. Here is what happens next:

1. Kickoff call on [date] at [time]. The agenda is attached.
2. Before the call, please send access to [list] and any brand files you have.
3. I will share a project plan with dates within 2 days of the call.

You will hear from me every [day] with a short update. If you need anything before then, reply to this email.

[Your name]

Access request list

What	Why	Status
Domain registrar	DNS changes for launch	
Hosting / CMS	Build and publish	
Google Analytics / Search Console	Baseline numbers	
Brand files (logo, fonts, colours)	Design	
Social accounts	Scheduling, if in scope	