Client Onboarding Guide

A repeatable workflow for a clear first impression and a confident start.

MEMBERS ONLY TEMPLATE

Make every first impression feel considered.

Use the prompts, checkboxes, and fillable fields to capture what is happening now. Save a fresh copy for each review or client.

NAME / BUSINESS

Name or business

Date

IN THIS RESOURCE

01 Prepare
Set up the steps.

02 Welcome
Give clear next moves.

03 Review
Improve the handoff.

The onboarding path

Adapt the sequence to your service, contract terms, and client needs.

01	Inquiry	Reply, qualify the request, and book a conversation.
02	Discovery	Confirm goals, scope, timing, and decision maker.
03	Agreement	Send proposal and terms; confirm approval before work begins.
04	Welcome	Share next steps, contacts, and preparation requests.
05	Kickoff	Align on priorities, communication, and first deliverable.
06	First month	Send updates, gather feedback, and review what is working.

Workflow checklist

Duplicate this checklist for each new client. Enter the owner and due date beside each phase.

	OWNER / DUE
☐ **Inquiry received** Log the request and respond with the next step.	
☐ **Discovery complete** Confirm the problem, desired outcome, timing, and budget.	
☐ **Proposal reviewed** Document deliverables, exclusions, timing, and fees.	
☐ **Agreement complete** Confirm signed terms and any required payment.	
☐ **Welcome sent** Introduce the point of contact and communication plan.	
☐ **Access ready** Invite through the relevant tools and share only needed files.	
☐ **Kickoff held** Capture decisions, owners, and the first milestone.	
☐ **First update sent** Show completed work, open questions, and next steps.	

Client details & kickoff

Capture just enough to start well; keep sensitive credentials in approved systems.

Client / business

Primary contact

Project or service

Start date

KICKOFF AGENDA

- [ ] What outcome matters most in the first 30 days?
- [ ] Which work should start first, and what can wait?
- [ ] Who approves decisions and how quickly?
- [ ] Where will requests, files, and updates live?

First agreed deliverable

Meeting decisions, owners, and due dates

Welcome message template

Customize the bracketed details. Confirm the agreement before promising a start date.

EMAIL / MESSAGE

Subject: Welcome, [Client name] - next steps

Hi [Name],

I’m glad we’re working together. Our focus is [priority or outcome]. I’ll be your point of contact for [scope of support].

Before our kickoff on [date and time], please share [specific materials] through [agreed method]. I’ll use [channel] for updates and send a brief progress note every [cadence].

At kickoff, we’ll confirm the first deliverable, key dates, and who will approve decisions. If anything changes before then, please reply here.

Thank you,

[Your name]

PERSONALIZATION CHECK

- [ ] Scope and start date match the agreement
- [ ] Request only the information needed now
- [ ] Every next step has an owner and date

First month review

Use a short check-in to improve the experience and prevent loose ends.

AT THE END OF THE FIRST MONTH

01 What was completed against the agreed scope?

02 What questions or approvals slowed progress?

03 What should change in our request or update process?

04 What are the next three priorities?

Client feedback / open decisions

Close the loop with a written recap: accomplishments, open items, owners, and the next check-in date.