# Client Onboarding Checklist

Client: [Name] · Owner: [Account manager] · Start date: [DD/MM/YYYY]

**ONBOARDING**

Service businesses
Agencies · Consultants · B2B services

## 1. BEFORE KICK-OFF

| ✓ | Task | Owner | Due |
|---|---|---|---|
| ☐ | Signed quotation / agreement received | [ ] | [ ] |
| ☐ | Advance payment received and recorded | [ ] | [ ] |
| ☐ | Client account and contacts created in CRM | [ ] | [ ] |
| ☐ | Internal handover from sales to delivery team | [ ] | [ ] |
| ☐ | Welcome message sent with next steps | [ ] | [ ] |

## 2. KICK-OFF

| ✓ | Task | Owner | Due |
|---|---|---|---|
| ☐ | Kick-off meeting scheduled and agenda shared | [ ] | [ ] |
| ☐ | Goals, success measures, and timeline agreed | [ ] | [ ] |
| ☐ | Access, documents, and inputs requested from client | [ ] | [ ] |
| ☐ | Communication channel and update frequency agreed | [ ] | [ ] |
| ☐ | Meeting notes and action items recorded in CRM | [ ] | [ ] |

## 3. FIRST 30 DAYS

| ✓ | Task | Owner | Due |
|---|---|---|---|
| ☐ | First deliverable / quick win delivered | [ ] | [ ] |
| ☐ | Week-2 check-in call held | [ ] | [ ] |
| ☐ | Open questions and blockers resolved | [ ] | [ ] |
| ☐ | 30-day review: progress against goals shared | [ ] | [ ] |
| ☐ | Feedback requested; next-quarter plan agreed | [ ] | [ ] |

Tip: keep this checklist as tasks on the client record so the whole team sees what is done and what is due.