

# Client Onboarding Checklist

A checklist for onboarding a new agency or service client from signed contract to project kickoff.

## Contract and Invoice

- Confirm the signed contract or statement of work is fully executed.
- Verify scope, deliverables and timeline match what was sold.  
*Catch scope gaps now, before work starts.*
- Send the first invoice or deposit request and confirm payment terms.
- Collect billing contact and any purchase order or vendor setup details.
- File the agreement and key terms where the project team can find them.

## Welcome and Internal Setup

- Send a warm welcome email introducing the team and next steps.
- Assign the account manager and project lead and name a primary contact.
- Create the client's project space, folders and task board.
- Brief the internal team on the client, goals and any sales context.
- Prepare a welcome packet outlining how the engagement will work.

## Kickoff Meeting

- Schedule the kickoff and send an agenda in advance.
- Introduce both teams and confirm everyone's role and responsibility.
- Align on objectives, success metrics and what good looks like.
- Walk through the project timeline and key milestones together.
- Capture decisions and action items, then share notes after the call.  
*Written recap prevents 'that's not what we agreed' later.*

## Gather Access and Assets

- Request logins and access to all required platforms and tools.
- Collect brand assets — logos, fonts, guidelines and templates.
- Gather existing content, data and reference materials.
- Confirm access levels are correct and security requirements are met.
- Track every requested item so nothing blocks the team mid-project.  
*A simple access tracker saves days of waiting.*

## Set Expectations and Communication

- Agree on communication channels and response-time expectations.
- Set the cadence and format for status updates and reports.
- Define the approval and feedback process and who signs off.
- Clarify the change-request process so scope stays controlled.
- Confirm key contacts on both sides and their availability.

## Project Plan and First Deliverable

- Build the project plan with phases, owners and due dates.
- Share the plan with the client and confirm their agreement.
- Set up reporting or a shared dashboard for visible progress.
- Deliver an early quick win to build momentum and trust.

○ Schedule the first review and a 30-day onboarding check-in.

An early check-in catches misalignment while it's cheap to fix.