

# New Client Onboarding Checklist

Use this document to track the onboarding process for new clients. Enter dates or initials in the fields to confirm completion of each task.

## Client Information

Client Company Name:

Primary Contact Name:

Primary Contact Email:

Assigned Account Manager:

Onboarding Start Date:

## Phase 1: Pre-Onboarding

- Date Completed / Initials:  Contract signed and countersigned by leadership.
- Date Completed / Initials:  First invoice sent and payment confirmed.
- Date Completed / Initials:  Internal team handover and kickoff preparation completed.

## Phase 2: Kickoff & Account Setup

- Date Completed / Initials:  Welcome email sent to client with onboarding resources.
- Date Completed / Initials:  Kickoff meeting scheduled and agenda shared.
- Date Completed / Initials:  Shared folders, communication channels, and client profiles created in CRM.
- Date Completed / Initials:  Access credentials and client assets gathered.

## Phase 3: Strategy & Implementation

- Date Completed / Initials:  Initial strategy outline drafted and approved internally.
- Date Completed / Initials:  Strategy presentation meeting conducted with the client.
- Date Completed / Initials:  Feedback integrated and final action plan approved.

## Phase 4: Launch & Handover

- Date Completed / Initials:  First deliverable or official campaign launched.
- Date Completed / Initials:  Client feedback survey sent regarding the onboarding experience.
- Date Completed / Initials:  Regular reporting cadence and recurring meetings finalized.

## Onboarding Notes and Comments

General Notes: