Checklist 14: Client Onboarding

Project Name: _____ Date: _____

		Yes	No
	Client onboarding refers to the process or journey involved in the formation of a new relationship with a client when introducing them to your business. It is important to systemize your onboarding process to avoid making common mistakes and to ensure that all the necessary steps are followed each time a new client comes along. It is essential to establish an impeccable client onboarding process in order to create a professional and organized front for your agency. Further, an effective onboarding process not only minimizes your turnover rate but further leads to referrals from satisfied clients, as well as positive reviews. This checklist provides a how-to guide for setting up a client onboarding process.		
	Stage 1 – Setting Expectations		
1	Discuss expectations and requirements with the client	☐	☐
2	Use tools such as Simul Docs to create a proposal agreement for the client	☐	☐
3	Develop and send a contract	☐	☐
4	Send invoice	☐	☐
5	Ensure the client signs the proposal and the contract before proceeding to the next step	☐	☐
	Stage 2 – Gather Client's Information		
6	Use a questionnaire to gather necessary information	☐	☐

Notes

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7	Include the client's business information including address and contacts	☐	☐
8	Inquire about the client's expectations for the project (goals and objectives)	☐	☐
9	Ask whether or not the client has worked with a similar agency before	☐	☐
10	Establish the main point of contact for the client	☐	☐
11	Inquire whether or not the client is willing to provide passwords	☐	☐
	Stage 3 – Team Briefing		
12	Provide your team with the pertinent information of the project	☐	☐
13	Clarify to your team what constitutes success for the project	☐	☐
14	Debrief the team regarding the research material and provide a summary of the project	☐	☐
15	Request that your team keeps the project's progress documented	☐	☐
	Stage 4 – Client Kick-off Meeting		
16	Conducting introductions between the team and the client	☐	☐
17	Determine the deliverables as well as the timeline	☐	☐

Notes

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18 Analyze what happens in the event of a scope creep ☐ ☐

19 Address any questions on either side ☐ ☐

Stage 5 – Client Check-In

20 Make a call to check on the project's progress after a given duration ☐ ☐

21 Schedule regular meetings to check-in with the client ☐ ☐

22 Refine the onboarding process ☐ ☐

Notes