Client onboarding checklist

Record the agreed starting point, then assign the readiness checks on page 2.

Client / organization

Project / reference

Project lead

Kickoff date

Target start date

1. Contacts and decisions

Role	Name and contact	Responsibility / availability
Day-to-day contact		
Scope / budget approver		
Billing contact		

Main communication channel

Report day / frequency

Response expectation

2. Agreed scope

Agreement / scope document and version

Approval date / reference

Deliverables included

Exclusions and assumptions

Acceptance criteria and who confirms completion

3. First milestone

Milestone / deliverable

Owner

Target date

Evidence needed to accept this milestone

Client onboarding checklist

Assign an owner and a due date. Use evidence or a reference to show that each check is complete.

Client / project

Readiness review date

4. Readiness checks

Check	Owner	Due	Evidence / status
Scope, exclusions and acceptance criteria agreed			
Decision maker and reporting cadence confirmed			
Required files / brand assets received			
Access invited and tested for each named user			
Billing details, currency and payment terms agreed			
First milestone and owner confirmed			
Dependencies and client inputs assigned			
Change request and approval process explained			

Record access owners or invitation references here. Keep passwords and secret keys in your approved password manager.

5. Ready to begin

☐ Ready ☐ Ready with agreed conditions ☐ Not ready

Open items / conditions and impact on the start date

Owner for each open item / follow-up reference

Next review date

Readiness confirmed by

Date

Written confirmation reference