TEMPLATES / CLIENT OPS

Client Onboarding Template

A step-by-step onboarding checklist for every new client. Follow this structured process to set expectations, grant access, and build momentum from day one.

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What you will get

- Welcome email template
- Client information collection form
- Project kickoff checklist
- Access & credentials setup guide
- Communication preferences worksheet
- Billing setup checklist
- First milestone definition template
- Team introductions format

Phase 1: Pre-Onboarding

Send welcome email

☐ Request client information form

☐ Set up client in CRM

☐ Create project workspace

☐ Configure billing and payment terms

Phase 2: Kickoff Meeting

☐ Introduce team members and roles

Review project scope

- [ ] Agree on communication channels
- [ ] Confirm timeline and milestones
- [ ] Walk through client portal

Phase 3: Setup & Access

- [ ] Set up shared drive
- [ ] Configure tool access
- [ ] Send client portal invitation
- [ ] Set up recurring meetings
- [ ] Create first milestone tasks

Phase 4: First Week Follow-up

- [ ] Check in on portal access
- [ ] Confirm first deliverable expectations
- [ ] Send project timeline
- [ ] Schedule first progress review

Quick Reference Checklist

#	TASK	DONE
1	Send welcome email	☐
2	Collect client information form	☐
3	Add client to CRM	☐
4	Create project workspace	☐
5	Set up billing	☐
6	Hold kickoff meeting	☐
7	Agree on communication channels	☐
8	Grant tool and portal access	☐
9	Set up recurring meetings	☐
10	Define first milestone	☐
11	Send project timeline	☐
12	First-week check-in call	☐

Tip: A badly onboarded client costs 2–3x more in unbilled admin. Invest 2 hours upfront to save 20 hours of friction later.

Related templates: Scope of Work Template · Project Kickoff Checklist