

New Client Onboarding Checklist

Client Information

- ☐ Company Name
- ☐ Primary Contact Name
- ☐ Email Address
- ☐ Phone Number
- ☐ Mailing Address

Agreements & Documentation

- ☐ Signed Contract
- ☐ NDA (if applicable)
- ☐ Invoice Sent
- ☐ Payment Received

Project Setup

- ☐ Kickoff Call Scheduled
- ☐ Project Plan Shared
- ☐ Access to Required Platforms
- ☐ Client Onboarding Document Sent

Internal Preparation

- ☐ Team Briefed
- ☐ Resources Allocated
- ☐ Timeline Defined

Notes