Client Onboarding Meeting Checklist

Pre-Meeting Preparation

- [ ] Review client background and objectives
- [ ] Prepare necessary documentation/contracts
- [ ] Set meeting agenda

During Meeting

- [ ] Welcome and introductions
- [ ] Discuss project goals and expectations
- [ ] Explain processes, timelines, and deliverables
- [ ] Clarify client roles and responsibilities
- [ ] Identify key contacts
- [ ] Address client questions and concerns

Post-Meeting Actions

- [ ] Send meeting summary/recap
- [ ] Share relevant documents and next steps
- [ ] Schedule follow-up meeting

Notes