**Client Onboarding Checklist Template**

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| BACKLOG | WELCOME | INITIATION | FOLLOW-UP |
| * Assign sales representative
* Assign customer care representative
* Contract analysis and validation
* Sales rep briefing regarding client logistics and predictions
 | * Welcome email introduction
* Schedule meeting
* Catalog any client questions
* Catalog any client reactions, red flags, issues, etc.
* Catalog any positive feedback
 | * Schedule client meeting / call to answer any additional questions
* Inquire as to how the client needs were met prior to employing this service or product
* Define client expectations
* Implement further staff training, if applicable
 | * Assess need for meetings
* Answer any questions
* Set short and long-term goals
* Answer any questions
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| CLOSING |
| * Customer needs met
* Review short and long-term goals
* Answer any questions
* Assess customer usage of services / tools
* Note any increase or decrease in usage
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