**Client Onboarding Checklist Template**

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| --- | --- |
| **Client Name** | Name |
| **Company Name** |  |
| **Industry** |  |
| **Primary Contact** |  |
| **Contact Email and Phone** |  |
| **Account Manager** |  |
| **Start Date** | MM/DD/YY |

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| --- | --- |
| Preparation and Setup |  |
| **Task** | **Owner** | **Status** |
|   |   | **Complete** |
|   |   | **Not Started** |
|   |   | **In Progress** |
|   |   | **Complete** |
|   |   | **Complete** |

|  |  |
| --- | --- |
| Welcome and Initial Engagement |  |
| **Task** | **Owner** | **Status** |
|   |   | **Complete** |
|   |   | **Not Started** |
|   |   | **In Progress** |
|   |   | **Complete** |
|   |   | **Complete** |

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| --- | --- |
| Onboarding and Implementation |  |
| **Task** | **Owner** | **Status** |
|   |   | **Complete** |
|   |   | **Not Started** |
|   |   | **In Progress** |
|   |   | **Complete** |
|   |   | **Complete** |

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| Follow-Up and Optimization |  |
| **Task** | **Owner** | **Status** |
|   |   | **Complete** |
|   |   | **Not Started** |
|   |   | **In Progress** |
|   |   | **Complete** |
|   |   | **Complete** |

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| --- | --- |
| Ongoing Success and Relationship Management |  |
| **Task** | **Owner** | **Status** |
|   |   | **Complete** |
|   |   | **Not Started** |
|   |   | **In Progress** |
|   |   | **Complete** |
|   |   | **Complete** |

|  |  |
| --- | --- |
| Final Review and Long-Term Strategy |  |
| **Task** | **Owner** | **Status** |
|   |   | **Complete** |
|   |   | **Not Started** |
|   |   | **In Progress** |
|   |   | **Complete** |
|   |   | **Complete** |

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