**[A blue and white sign

AI-generated content may be incorrect.](https://www.smartsheet.com/try-it?trp=8779&utm_source=template-word&utm_medium=content&utm_campaign=Client+Onboarding+Checklist-word-8779&lpa=Client+Onboarding+Checklist+word+8779)Client Onboarding Checklist Template**

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

|  |  |  |
| --- | --- | --- |
| 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** |

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

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

|  |  |  |
| --- | --- | --- |
| 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** |

|  |
| --- |
| **DISCLAIMER**  Any articles, templates, or information provided by Smartsheet on the website are for reference only. While we strive to keep the information up to date and correct, we make no representations or warranties of any kind, express or implied, about the completeness, accuracy, reliability, suitability, or availability with respect to the website or the information, articles, templates, or related graphics contained on the website. Any reliance you place on such information is therefore strictly at your own risk. |