

Client Onboarding Checklist

24 steps from signed contract to first deliverable. Duplicate for every new client.

Phase 1 — Contract & Commercial (Day 0)

- Contract signed and countersigned by both parties
- Invoice sent and payment confirmed
- Project start date agreed in writing
- Client added to CRM / Client Tracker
- Kickoff call scheduled (calendar invite sent)
- Welcome email sent to client

Phase 2 — Discovery & Access (Day 1–2)

- Kickoff call completed
- Onboarding questionnaire sent to client
- Onboarding questionnaire received and reviewed
- Access granted to required tools (ClickUp / Notion / Drive)
- Existing workspace and processes reviewed
- Pain points and priorities documented
- Scope confirmed and agreed in writing

Phase 3 — Build & Documentation (Day 2–7)

- Workspace structure designed and signed off internally
- Core workspace built (spaces, folders, lists / pages, databases)
- Custom fields and statuses configured
- SOPs drafted for top 3 recurring processes
- Automations set up (if in scope)
- Internal review completed — no broken links or logic errors
- Client invited to workspace with correct permissions

Phase 4 — Handoff & Go-Live (Day 7–10)

- Walkthrough call booked with client
- Walkthrough call completed — client understands the system
- Loom recording sent to client (recommended)
- 7-day check-in scheduled
- Final invoice sent (if milestone-based)
- Testimonial / review requested
- Case study notes captured (optional)

Template by Runflow — runflowagency.com