**Client Onboarding Checklist Template [](https://bit.ly/38ZZGdV)**

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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 |
| 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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