

# Your Ultimate Client Onboarding Guide

## ☐ Send a welcome message

1. A welcome greeting that fits with your brand
2. A reminder of what they signed up for (this is especially important if you offer multiple products or services)
3. Contact information for customer service
4. A message about your excitement about working with the client

## ☐ Set your expectations

1. What products/services the client receives
2. What your team will provide to the client
3. Customer service/support options
4. Client relationship expectations

## ☐ Make sure all legal documents are in order

1. Prepare a contract that outline the services you provide and what the client will receive
2. Prepare an NDA and have that included in your legal documents
3. Make sure you have their payment agreement documented

## ☐ Create an assessment for your clients

1. What goals do you want to achieve with our service/product?
2. How do you want to allocate your budget?
3. Do you have key performance indicators (KPIs) you're targeting? What are they?
4. What assets and resources do you already have?
5. Who is your ideal customer?

## ☐ Have a client meeting with your team

1. Introduce the client to the team working on their project
2. Introduce the point of contact
3. Review the client's goals
4. Go over the plan for the client and timeline (which you help create from the assessment questionnaire)
5. Hash out deadlines and last-minute details
6. Provide opportunities for questions

## ☐ Deliver a welcome package

1. A guide to your company (hours of operation, contact information, locations, etc.)
2. Helpful resources for clients (guides, articles, etc.)
3. Case studies from similar companies

## ☐ Plan check-ins

1. Plan a check-in about a month after you start — it may be longer or shorter depending on the project and what the client wants.

## ☐ Gather feedback about your client onboarding process

1. How satisfied are you with your onboarding experience? (Can be a scale of 1 to 10, or a "neutral, very, extremely" scale)
2. Did you receive everything you needed for onboarding? If not, what was missing?
3. Do you still feel satisfied with your investment after the onboarding process?
4. What can we do to make the onboarding experience better?