Client Onboarding Checklist

Client Information

- [ ] Collect basic client details (name, company, contact info)
- [ ] Create client profile in system

Agreements & Documentation

- [ ] Send/receive signed NDA (if required)
- [ ] Prepare & sign engagement contract
- [ ] Agree on payment terms and method

Kickoff Preparation

- [ ] Schedule initial kickoff meeting
- [ ] Prepare & share kickoff agenda
- [ ] Set up project management tools/folders

Discovery & Data

- [ ] Request relevant background information/data
- [ ] Grant consultant access to necessary resources

Communication & Orientation

- [ ] Identify primary contacts & stakeholders
- [ ] Confirm communication & reporting preferences
- [ ] Outline key project milestones & deliverables

Other Tasks

- [ ] Set up billing/client invoicing preferences
- [ ] Share orientation materials or FAQs