

Client Onboarding Process Mapping Template

1. General Information

Client Name:

Enter client name

Date:

Project/Service:

Enter project or service

2. Stakeholders

Name	Role	Contact Information
Enter name	Enter role	Enter contact

3. Onboarding Stages

Stage	Owner	Description	Expected Duration	Notes
E.g. Kickoff				

4. Dependencies & Risks

Dependency/Risk	Owner	Mitigation/Action

5. Notes & Additional Information

Enter notes here