Client Onboarding Checklist

Management Consulting Firm

1. Initial Contact & Discovery

- ▢ Receive client inquiry and confirm receipt
- ▢ Schedule introductory meeting/call
- ▢ Collect preliminary information about client needs
- ▢ Share overview of consulting services & approach
- ▢ Discuss confidentiality, timelines, and next steps

2. Engagement Setup

- ▢ Send & receive completed client intake form
- ▢ Conduct conflict of interest check
- ▢ Verify client contact and billing details
- ▢ Prepare and send proposal & scope of work
- ▢ Negotiate and finalize agreement/contract

3. Onboarding Meetings & Planning

- ▢ Organize kickoff meeting with key stakeholders
- ▢ Align on project goals, deliverables, and timeline
- ▢ Assign project roles and responsibilities
- ▢ Establish communication protocols (meetings, reporting, etc.)
- ▢ Discuss data, confidentiality, and security requirements

4. Documentation & Information Gathering

- ▢ Collect relevant background documents and data
- ▢ Send Non-Disclosure Agreement (NDA) for signature if needed
- ▢ Provide client access to secure document sharing platform
- ▢ Request any necessary system or software access

5. Project Setup

- ▢ Create project plan and milestones
- ▢ Set up internal tracking and reporting systems
- ▢ Confirm invoicing and payment schedule

- ▢ Share welcome and contact emails with client team
- ▢ Document all onboarding steps in project management system

Note: This checklist is a template. Add, remove, or modify steps to fit your firm's specific onboarding process.