

B2B Client Onboarding Checklist

Client Information

Company Name	
Main Contact Person	
Email	
Phone	
Address	

Onboarding Steps

- Welcome email sent
- Client introduction call scheduled
- Business requirements collected
- Contract/agreement signed
- Billing information confirmed
- Product/services overview provided
- System access granted
- Training & resources shared
- Technical integration started
- First milestone delivered
- Regular check-ins scheduled

Notes

Onboarding Completed By

Name	
Date	