

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	