Client Onboarding Checklist

Date

Initial Contact

- ☐ Inquiry answered, initial meeting proposed, contact info recorded in "Prospects" ________
- ☐ **Set Reminder:** Follow up on ______________ if prospect hasn't responded. ________

Initial Phone Call

- ☐ Phone Intake completed (contact information, project description, etc.) ________
- ☐ Appointment for "In Person" consultation booked and added to calendar. ________

Post Meeting

- ☐ Client contact info added to "Active Clients" ________
- ☐ Client added to newsletter list ☐ Client Agreed. ☐ Client Declined. ________
- ☐ Client Added to bookkeeping system. ________
- ☐ Create client folder (paper + electronic) ________
- ☐ Prepare + Customize Documents (Proposal, Process, Letter of Agreement, Photo Waiver, etc.) ________
- ☐ Send Client Letter of Agreement, Photo Waiver, etc. ________
- ☐ **Set Reminder:** Contact client if signed documents are not returned by ____________. ________
- ☐ Client Returned Signed: Letter of Agreement, Photo Waiver, etc. ________
- ☐ Signed Documents Filed in Client Folder ________

Welcome Package

- ☐ Prepare and Customize Welcome Package
  (Proposal, Process, Welcome Letter, Business Contact Info, FAQs, Tips Sheet, branded swag, etc.) ________
- ☐ Send Client Welcome Package ________
- ☐ **Set Reminder:** Contact client on ___________ which is ____ days before appointment. ________

Prepare for First Appointment

- ☐ Contact client on ____________ which is ____ days before appointment. ________
- ☐ Prepare for appointment. ________