A 15 Step Process to Successfully On-Board Your New Client

Each time you sign on a new client, follow these 15 steps and use this checklist to successfully and professionally on-board your new client.

- [ ] Client has signed contract
- [ ] Client has paid for down payment to get started on project
- [ ] Create client's digital folder
- [ ] Send welcome email/packet to client
- [ ] Set up and send next month's invoice
- [ ] Create reoccurring invoices for the duration of project
- [ ] Send client a "get to know them" questionnaire
- [ ] Introduce client to any other team members that will be working on project
- [ ] Collect usernames and passwords for client's social media, website, blog
- [ ] Schedule a kick of meeting with client and include any other team members that will be involved in the project
- [ ] Map out client's marketing strategy in detail
- [ ] Set up internal weekly, monthly, quarterly, yearly goals for client
- [ ] Assign tasks to team members, create a separate todo checklists for them
- [ ] Set up a reoccurring weekly internal meeting
- [ ] Start project