New Client Onboarding Checklist for Lawyers

Each time your law firm signs on a new client use this free checklist to make the onboarding process easy for you and them.

INTRODUCTION MEETING & CLIENT SET UP:

- [ ] Quick introduction and a summary for what the client can expect
- [ ] Collect all client details (contact information, copy of client's ID, any additional information, record date of meeting)
- [ ] Create client folder (paper/digital)
- [ ] Send client first invoice and client agreement for them to sign
- [ ] Collect payment and signed agreement

FIRST MEETING:

- [ ] Set out welcome email
- [ ] Schedule first call or meeting
- [ ] Send out details for first call or meeting
- [ ] Prepare meeting agenda and send out

MEETING:

- [ ] Take notes during meeting

AFTER MEETING:

- [ ] Request any additional documents
- [ ] Create client timeline
- [ ] Layout client strategy and review with client
- [ ] Set up any additional meetings
- [ ] Invoice for additional payments with duedates
- [ ] Record any additional notes or documents