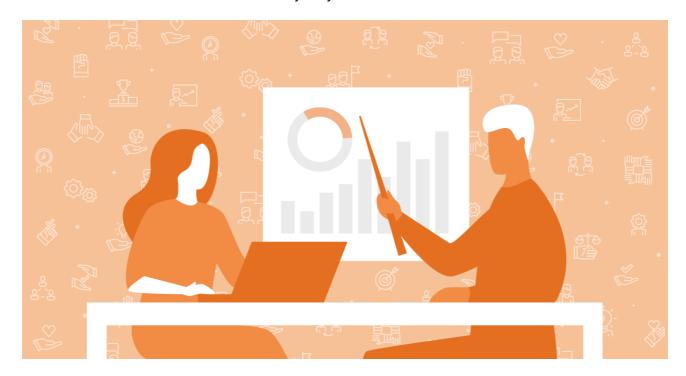
New Client Onboarding Checklist for Lawyers

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	Make and Share Free Checklists
	checkli.com