

# 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 due dates
- Record any additional notes or documents

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