

# Client Onboarding Checklist

Dear [Client Name],

Welcome aboard! We are excited to start this journey with you. To ensure a smooth onboarding process, please review the checklist below:

- Gather necessary documentation:
  - Completed onboarding form
  - Identification documents
  - Access credentials
- Schedule onboarding training session:
  - Proposed dates and times
  - Participants from your team
- Review service agreements:
  - Sign and return the service agreement
  - Understand terms and conditions
- Establish communication channels:
  - Assign key contacts from both teams
  - Set up regular check-in meetings
- Define goals and objectives:
  - Initial project scope discussion
  - KPIs and success metrics

We look forward to working with you! If you have any questions or need assistance, please don't hesitate to reach out.

Best regards,  
[Your Name]  
[Your Position]  
[Your Company]