

Initial Client Onboarding Checklist

Dear [Client Name],

Thank you for choosing [Your Company Name]. We are excited to start working with you! To ensure a smooth onboarding process, please review the following checklist:

Onboarding Checklist

- **Welcome Call:** Schedule an introductory call.
- **Documentation:** Provide necessary documentation (e.g., contracts, agreements).
- **Set Goals:** Discuss and define project goals and objectives.
- **Access Setup:** Create and share access to relevant tools and platforms.
- **Point of Contact:** Establish primary contacts on both sides.
- **Timeline:** Review project timeline and key milestones.
- **Feedback Process:** Set up a process for ongoing feedback and communication.

If you have any questions, please feel free to reach out. We look forward to a successful partnership!

Best regards,

[Your Name]

[Your Job Title]

[Your Company Name]

[Your Contact Information]