

Client Integration Checklist

Date: _____

Client Name: _____

Client Contact: _____

Checklist Items

- 1. Initial Client Meeting Conducted: _____
- 2. Required Documentation Gathered: _____
- 3. Integration Scope Defined: _____
- 4. Technical Requirements Reviewed: _____
- 5. Communication Plan Established: _____
- 6. Milestones and Deadlines Set: _____
- 7. Follow-up Meeting Scheduled: _____

Additional Notes

Client Approval

Client Signature: _____ Date: _____