

Welcome to [Your Company Name]!

Dear [Client's Name],

We are excited to have you onboard as our new client! To ensure a smooth and successful start, we have created a Customer Onboarding Checklist for you. Please take a moment to review the steps below:

Customer Onboarding Checklist

1. **Complete Required Documentation:** Please provide us with the necessary documents as mentioned in your onboarding package.
2. **Schedule Onboarding Call:** Let's arrange a call to discuss your needs and our services in detail.
3. **Access Our Portal:** Log in to our client portal at [Portal URL] to familiarize yourself with the resources available.
4. **Assign Point of Contact:** Please designate a primary contact person for ongoing communication.
5. **Set Goals and Expectations:** We will work together to establish key goals and performance indicators.

If you have any questions or need assistance, feel free to reach out to us at [Contact Email] or [Contact Phone Number].

Thank you for choosing [Your Company Name]. We look forward to a successful partnership!

Best Regards,

[Your Name]

[Your Position]

[Your Company Name]

[Your Phone Number]

[Your Email]