

The client onboarding checklist

Twelve checks that stop a new client going quiet in week two.

Most clients do not leave because something dramatic happened. They leave because nobody told them what was happening next. Work through these twelve in the first week of every engagement and the week-two silence stops.

1. The signed agreement is on file

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Both sides, the same version, the same day. Nothing else counts as a start.

2. The scope is written in one paragraph

☐ 2. The scope is written in one paragraph

If it takes ten minutes to read, it is too vague. The client should be able to repeat it back.

3. The first outcome is one measurable sentence

☐ 3. The first outcome is one measurable sentence

"We will make it better" is not a target. "Six published posts and 200 new subscribers" is.

4. The start date and the first deadline are in the calendar

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A date nobody has diarised is a date that will slip.

5. Access and permissions are confirmed in writing

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The most common week-two blocker is a shared drive the client never opened.

6. The payment method and billing schedule are confirmed

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Money is not a relationship problem. It is a process, and processes get confirmed.

7. The client knows exactly what happens in week one

☐ 7. The client knows exactly what happens in week one

One email with the plan, the dates and the people. That email prevents half the follow-ups.

8. Every meeting has an owner and a next action

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If the call has no next action, it will have no outcome. Write it before you hang up.

9. One channel, one rhythm

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Email, chat or calls. Pick one for the client, pick one for you, and never mix them.

10. The report template is shared and explained

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A report nobody understands is a report nobody reads.

11. The blockers list exists

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11. The blockers list exists

Ask what would stop this working, write it down, and solve it while the client is still motivated.

12. The review date is booked before the work starts

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12. The review date is booked before the work starts

A review that is booked after the work ends is a review that never happens.

These twelve checks are the first third of the onboarding checklist inside every Operating System.
The rest covers delivery, offboarding, the tracker, the documents and the automations.

This is a working document, not legal or professional advice. Review it for your own business before you rely on it.

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