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Client Onboarding Workflow Template

Complete 30-Day Onboarding Playbook

A step-by-step workflow template to onboard new clients smoothly, set expectations, and start projects on the right foot.

- Reduce time-to-value for new clients
- Set clear expectations from day one
- Create consistent onboarding experiences
- Minimize early-stage client churn

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1. Pre-Kickoff (Days -7 to 0)

Tasks to complete before the client officially starts.

- [ ] 1.1 Send welcome email with next steps
  Tip: Send within 2 hours of contract signing
- [ ] 1.2 Create client folder/workspace in project tool
  Tip: Use consistent folder structure
- [ ] 1.3 Set up client portal access
  Tip: Include a walkthrough video link
- [ ] 1.4 Schedule kickoff call
  Tip: Offer 2-3 time slots
- [ ] 1.5 Send pre-kickoff questionnaire
  Tip: Keep to 10 questions max

2. Day 1: Welcome & Orientation

The first day sets the tone for the relationship.

- [ ] 2.1 Conduct kickoff call with key stakeholders
  Tip: Record the call for reference
- [ ] 2.2 Walk through project scope and timeline
  Tip: Use visual timeline
- [ ] 2.3 Introduce team members who'll be working on account
  Tip: Share brief bios
- [ ] 2.4 Confirm communication channels and response times
  Tip: Document in shared space
- [ ] 2.5 Send kickoff call summary within 24 hours
  Tip: Include action items and owners

3. Week 1: Foundation

Building the foundation for successful collaboration.

- [ ] 3.1 Complete discovery/research phase
  Tip: Share findings with client
- [ ] 3.2 Request all necessary access credentials
  Tip: Use secure password sharing
- [ ] 3.3 Deliver first status update
  Tip: Establish update rhythm early
- [ ] 3.4 Identify quick wins and communicate them
  Tip: Build momentum and trust
- [ ] 3.5 Schedule recurring meetings
  Tip: Weekly for first month, then adjust

4. Week 2-3: Momentum Building

Delivering early value and building trust.

- [ ] 4.1 Deliver first tangible outcome/milestone
  Tip: Even small wins matter
- [ ] 4.2 Request informal feedback on experience so far
  Tip: Quick call or survey
- [ ] 4.3 Share relevant insights or recommendations
  Tip: Show proactive thinking
- [ ] 4.4 Document any scope clarifications needed
  Tip: Handle before they become issues
- [ ] 4.5 Introduce additional team members as needed
  Tip: Expand the relationship

5. Day 30: Relationship Check

Formal check-in to ensure alignment and satisfaction.

- [ ] 5.1 Conduct 30-day review call
  Tip: Review progress against goals
- [ ] 5.2 Gather formal feedback via survey
  Tip: NPS + open-ended questions
- [ ] 5.3 Review and adjust processes if needed
  Tip: Be open to client preferences
- [ ] 5.4 Confirm ongoing communication cadence
  Tip: Adjust based on feedback
- [ ] 5.5 Celebrate wins achieved in first month
  Tip: Recognition builds partnership

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