

New Cleaning Client Onboarding Checklist

From signed agreement through the first service and initial quality follow-up.

Client and Agreement

- Record legal client name, service address, decision-maker, billing contact, and emergency contact.
- Confirm signed service agreement, start date, frequency, scope, exclusions, and pricing.
- Document any one-time setup, initial deep clean, or post-construction requirements.
- Confirm payment method, invoicing schedule, due date, and purchase-order requirements.

Walkthrough and Site Readiness

- Complete an in-person walkthrough for recurring janitorial work where required.
- Confirm square footage, room types, floor surfaces, restrooms, traffic patterns, and site-specific needs.
- Record access procedures, alarm codes, parking, loading, keys/fobs, and restricted areas securely.
- Identify safety risks, chemical restrictions, and any client-provided supplies or consumables.
- Document photo references and final scope for the assigned cleaning team.

Scheduling and Service Assignment

- Create the customer profile and job schedule in the CRM or scheduling platform.
- Assign a qualified cleaner or subcontractor appropriate to the scope and site requirements.
- Confirm who supplies equipment, chemicals, tools, and consumables under the agreement.
- Provide the assigned provider with scope, site instructions, start time, access details, and client expectations.
- Confirm provider acceptance and a backup coverage plan.

Client Communication

- Send a welcome message with start date, arrival window, service contact, and escalation process.
- Explain how to request changes, report deficiencies, and approve additional work.
- Confirm billing contact, invoice delivery method, and payment instructions.
- Set expectations for first-service inspection and follow-up.

First Service and Quality Review

- Verify the team arrived and gained access successfully.
- Confirm work was completed against the approved scope.
- Complete a quality inspection and document any corrective actions with deadlines.
- Follow up with the client after the first service and record feedback.
- Resolve any issues promptly and document approval or completion.

Handoff and Ongoing Management

- Store signed documents and service instructions in the client record.
- Set recurring inspections, review dates, and periodic scope/pricing checks.
- Confirm the first invoice is scheduled and payment collection is monitored.
- Assign the ongoing account owner and confirm who handles client escalations.

Completion

- Onboarding owner: _____ Start date: _____
- First service completed: _____ Client follow-up date: _____
- Outstanding items / owner / due date: _____

Guidance: This checklist is a general operations template; adjust to your company, contract, service model, and local requirements.