

AT READY

Client Onboarding Checklist Template

41 steps across 7 phases – for digital, creative, and marketing agencies

01. Pre-Kickoff (Before Day 1)

Complete all items before the client relationship officially begins.

- | | |
|--|-------|
| <input type="checkbox"/> Contract signed and countersigned | OWNER |
| <input type="checkbox"/> Invoice sent and deposit received | OWNER |
| <input type="checkbox"/> Internal team briefed on the project | OWNER |
| <input type="checkbox"/> Client POC confirmed (name, email, phone) | OWNER |
| <input type="checkbox"/> Kickoff call scheduled | OWNER |
| <input type="checkbox"/> Kickoff agenda sent to client | OWNER |
| <input type="checkbox"/> Shared folder / workspace created | OWNER |
| <input type="checkbox"/> Access requests sent to client | OWNER |

02. Kickoff Call

Run through every item during the kickoff call and confirm before closing.

- | | |
|---|-------|
| <input type="checkbox"/> Introductions and team roles confirmed | OWNER |
| <input type="checkbox"/> Project scope reviewed and agreed | OWNER |
| <input type="checkbox"/> Goals and success metrics confirmed | OWNER |
| <input type="checkbox"/> Timeline reviewed and approved | OWNER |
| <input type="checkbox"/> Communication channels agreed (Slack / email / portal) | OWNER |
| <input type="checkbox"/> Meeting cadence set | OWNER |
| <input type="checkbox"/> Next steps documented and shared | OWNER |

03. Admin & Legal

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Confirm all paperwork and compliance items before project work begins.

- Signed contract on file OWNER
- NDA executed (if required) OWNER
- Client billing details collected OWNER
- Payment terms confirmed OWNER
- Insurance certificates exchanged (if required) OWNER
- GDPR / data processing agreement signed (if required) OWNER

04. Access & Tools

Request and confirm all platform access before work starts. Log platform name and access level granted.

<input type="checkbox"/> Website / CMS access granted	PLATFORM	ACCESS LEVEL	OWNER
<input type="checkbox"/> Analytics (GA4 / Search Console)	PLATFORM	ACCESS LEVEL	OWNER
<input type="checkbox"/> Social media account access	PLATFORM	ACCESS LEVEL	OWNER
<input type="checkbox"/> Ad accounts (Google / Meta / LinkedIn)	PLATFORM	ACCESS LEVEL	OWNER
<input type="checkbox"/> Email marketing platform access	PLATFORM	ACCESS LEVEL	OWNER
<input type="checkbox"/> Project management tool access	PLATFORM	ACCESS LEVEL	OWNER
<input type="checkbox"/> Cloud storage access	PLATFORM	ACCESS LEVEL	OWNER
<input type="checkbox"/> Other (specify in Platform column)	PLATFORM	ACCESS LEVEL	OWNER

05. Brand & Assets

Collect all brand materials before producing a single deliverable.

- Brand guidelines received OWNER
- Logo files (all formats) received OWNER
- Colour palette and fonts confirmed OWNER
- Brand voice / tone of voice document OWNER
- Photography / video assets received OWNER
- Competitor reference list OWNER
- Examples of liked / disliked work OWNER

AT READY

06. Stakeholders & Communication

Document the decision chain and communication norms before work begins.

- | | |
|--|-------|
| <input type="checkbox"/> Decision-maker identified | OWNER |
| <input type="checkbox"/> Approval chain documented | OWNER |
| <input type="checkbox"/> Escalation path agreed | OWNER |
| <input type="checkbox"/> Reporting format confirmed (weekly / monthly / on-demand) | OWNER |
| <input type="checkbox"/> Feedback turnaround SLA agreed (client side) | OWNER |

07. Sign-off

Complete once all phases are done and the project is officially underway.

Project start date	Agency lead (name + signature)
Client name (name + signature)	Date completed