

CLIENT ONBOARDING CHECKLIST

This checklist is provided by Clientish as a free, editable starting point. Replace the bracketed fields with your own details, assign an owner and due date to each item, and adapt the steps to your agency's services. Duplicate it for every new client.

Client: [Client Name] | **Account manager:** [Name] | **Start date:** [Date] | **Services:** [Scope]

How to use: tick each box as it is completed, and fill the Owner and Due columns so every task has a name and a date against it.

Phase 1 — Before You Start (First 48 Hours)

Done	Task	Owner	Due
☐	Hold internal handoff from sales to delivery (what was sold, promised, expected)	☐	☐
☐	Confirm the signed contract and SOW are on file and scope is clear	☐	☐
☐	Send the welcome email within one hour of signing	☐	☐
☐	Create the client workspace / portal (folders for scope, deliverables, assets, comms)	☐	☐
☐	Assign the team: day-to-day contact, work lead, escalation owner	☐	☐
☐	Share the client's main point of contact and how to reach them	☐	☐

Phase 2 — The First Week

Done	Task	Owner	Due
☐	Send the onboarding questionnaire (goals, brand, audience, competitors, tools)	☐	☐
☐	Pre-fill the questionnaire with anything already known from the sales process	☐	☐
☐	Request access and credentials as one organized list (see Access Checklist below)	☐	☐
☐	Confirm all access received and working	☐	☐
☐	Audit the client's current setup, performance, and assets (baseline)	☐	☐
☐	Send the kickoff meeting agenda 24 hours in advance	☐	☐
☐	Run the kickoff call: intros, scope confirm, 30/60/90 goals, cadence, first milestone	☐	☐
☐	Send the written kickoff summary within a couple of hours	☐	☐

Phase 3 — The First 30 Days

Done	Task	Owner	Due
☐	Confirm the communication cadence, channel, and response times in writing	☐	☐
☐	Set up reporting / dashboard and agree	☐	☐

	the KPIs to report against		
☐	Deliver one quick win within the first ten days (audit, snapshot, first draft)	☐	☐
☐	Send the first progress report within the first week or two	☐	☐
☐	Schedule recurring check-ins (weekly for the first month)	☐	☐
☐	Hold the 30-day check-in: review progress, surface blockers, collect feedback	☐	☐
☐	Confirm the plan for the next 60 days	☐	☐

Access Checklist

Request only what the engagement needs. Tick what applies, then confirm each is received and working.

Done	Access / credential	Notes
☐	Website / CMS admin access	[e.g. WordPress, Shopify, Webflow]
☐	Google Analytics	[property / view]
☐	Google Search Console	
☐	Google Business Profile	[for local work]
☐	Advertising accounts (Google Ads, Meta, etc.)	[admin, not just access]
☐	Social media profiles	[via business-manager tool where possible]
☐	Email / marketing platform	[e.g. Mailchimp, Klaviyo]
☐	Hosting / domain registrar	[where needed]
☐	Other tools	[list]

Onboarding Questionnaire — Core Questions

Send to the client in Phase 2. Pre-fill anything already known from sales.

1. In one or two sentences, what does your business do, and who is your ideal customer?
2. What are your top one to three goals for this engagement over the next 90 days?
3. How will you know this is working? What does success look like to you?
4. Who are your main competitors, and what do you admire or want to avoid about them?
5. Do you have brand guidelines, logos, or existing assets we should use? (Link them.)
6. What tools and platforms are currently in use for this work?
7. Who are the key contacts and decision-makers on your side, and who approves work?
8. What is your preferred communication channel and expected response time?
9. Are there any hard deadlines, launches, or events we should plan around?
10. Is there anything that has not worked with a previous agency that we should know?

Kickoff Call Agenda (30–45 minutes)

Time	Item
0–3 min	Team introductions (names, roles, who to contact for what)
3–10 min	Confirm scope and goals match the client's understanding
10–18 min	Agree communication norms, channel, and response times
18–25 min	Walk through the first milestone and its deadline
25–28 min	Client questions
28–30 min	Recap next steps, owners, and dates

Send a written summary of decisions, owners, and dates within a couple of hours of the call.

Sign-off

Onboarding completed by:	[Account manager]
Date onboarding completed:	_____
30-day check-in held:	[] Yes, on _____

Want your clients to experience onboarding, not just your team? Clientish gives each new client a branded portal on your own subdomain from day one, where they see their orders and invoices and can open a support ticket instead of chasing email. Start a 7-day free trial at the Clientish site.