

WEB DESIGN 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 studio. Duplicate it for every new web project.

Client: [Client Name] | **Project lead:** [Name] | **Start date:** [Date] | **Project:** [e.g. 8-page marketing site]

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.

Phase 1 — Before You Start (First 48 Hours)

Done	Task	Owner	Due
☐	Internal handoff from sales to delivery (goals, page scope, promises)	☐	☐
☐	Confirm the signed contract and deposit are on file	☐	☐
☐	Send the welcome message within one hour of signing	☐	☐
☐	Create the project workspace / portal	☐	☐
☐	Assign the team: project lead, designer, escalation owner	☐	☐

Phase 2 — Discovery and Collection (First One to Two Weeks)

Done	Task	Owner	Due
☐	Run the discovery call (goals, audience, must-have pages/features,	☐	☐

	likes/dislikes)		
[]	Send the onboarding questionnaire (see questions below)	[]	[]
[]	Collect content and brand assets (see Asset Checklist)	[]	[]
[]	Confirm who writes each page's copy (see Content Responsibility)	[]	[]
[]	Build and get sign-off on the creative brief (see Brief worksheet)	[]	[]
[]	Agree the sitemap / page list and scope in writing	[]	[]
[]	Collect access (hosting, domain, CMS, existing site)	[]	[]

Phase 3 — Ready to Design (Kickoff)

Done	Task	Owner	Due
[]	Confirm all assets, copy, brief, scope, and access are in	[]	[]
[]	Agree the revision rules (rounds included, what counts, feedback deadline)	[]	[]
[]	Lock the milestones and payment schedule	[]	[]
[]	Run the design kickoff (recap brief, scope, timeline, feedback process)	[]	[]

Asset Checklist

The content black hole is the top cause of stalled web projects. Give every item an owner and a due date.

Done	Asset	Owner	Due
[]	High-resolution logo (vector where possible)	[]	[]
[]	Brand guidelines / style guide	[]	[]
[]	Fonts / typography	[]	[]
[]	Photography / image library	[]	[]
[]	Product / service details	[]	[]
[]	Existing site content to migrate	[]	[]
[]	Testimonials / reviews	[]	[]
[]	Legal pages (privacy, terms)	[]	[]

Content Responsibility (per page)

Agree explicitly who writes each page's copy. Missing copy is the number-one reason projects stall.

Page	Copy written by	Due date
Home	[Client / Agency]	[]
About	[Client / Agency]	[]
Services / Products	[Client / Agency]	[]
Contact	[Client / Agency]	[]
[Other page]	[Client / Agency]	[]

Creative Brief Worksheet

Complete and get stakeholder sign-off BEFORE design begins.

Element	Notes
Project goal	[what the site must achieve]
Target audience	[who it is for]
Key actions / conversions	[what visitors should do]
Tone and personality	[adjectives]
Style direction	[modern, minimal, bold, etc.]
Colour preferences	[brand colours / mood]
Reference sites (likes)	[URLs + what you like]
Reference sites (dislikes)	[URLs + what to avoid]

Must-have features	[forms, booking, shop, etc.]
Sign-off by	[stakeholder + date]

Sitemap / Scope

Confirm the page list and functionality in writing. Additions become quoted changes.

Page	Included?	Notes / functionality
[Home]	[]	[]
[About]	[]	[]
[Services]	[]	[]
[Contact]	[]	[]
[Blog / other]	[]	[]

Revision Rules

Setting	Value
Revision rounds included per deliverable	[e.g. 2]
What counts as one round	[one consolidated set of feedback]
Rate beyond included rounds	[hourly rate]
Client feedback deadline	[e.g. within 5 business days]
What happens if feedback is late	[timeline shifts; agency does not absorb delay]

Access Checklist

Done	Access	Notes
[]	Hosting account	[]
[]	Domain registrar	[]
[]	CMS (WordPress, Webflow, Shopify, etc.)	[]
[]	Existing site login	[if redesign]
[]	Analytics / Search Console	[if migrating]

Web Design 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 is the main goal of this website (leads, sales, bookings, information)?
3. What should a visitor do when they land on the site?
4. Which pages and features must the site include?
5. Who are your competitors, and which of their sites do you like or dislike?
6. Do you have brand guidelines, a logo, fonts, and photography ready? (Link them.)
7. Who will write the copy for each page, you or us?
8. Are there sites you love the look of? (Share two or three with what you like.)
9. Who approves designs on your side, and what is your feedback turnaround?
10. Do you have a hard launch date or event to plan around?

Sign-off

Onboarding completed by:	[Project lead]
All assets and copy received on:	_____
Creative brief signed off on:	_____
Design kickoff held 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.