

Client onboarding checklist

Prepare the information, responsibilities and first action for a new client.

The agreement and the first useful result	Information, access and named responsibilities	A completed content-service example
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A free worksheet from ailevrg.com/guides/client-onboarding-checklist

Use the parts that matter to this service. Keep the checklist short for a small job and add detail where missing information could change the work.

01 Agreement

Client and service	Current agreement and where to find it
First useful result and its purpose	Work that is outside this agreement

02 Context and inputs

Goals, audience or reporting questions	Existing context we can reuse after checking
Information still needed and its owner	Systems or records requiring access

03 People

Client contact for questions

Client approver and approval route

Delivery owner and backup

How each side will receive progress and questions

04 Ready to start

Open issue that affects the first job

Person resolving it and next action

First action and planned start

How we will confirm the first result is accepted

Starting a content service

Invented teaching example. No client outcome is claimed.

First result

A draft for an agreed audience using the client's current business context.

Known context

An existing brief describes the audience and tone.

The client confirms which business details have changed.

Responsibilities

The delivery owner checks the brief.

A named client contact approves the draft through the agreed route.

Open issue

A proposed customer example is not yet approved for use.

The first draft uses another approved example while that decision is resolved.

Start

The delivery owner begins once the current brief and approval route are confirmed.