

New Client Onboarding Checklist

Step	Done	Date	Notes
Enquiry logged and replied to within 1 working day			
Needs and budget confirmed			
Quote or proposal sent, with terms and payment dates			
Acceptance received in writing			
Deposit invoiced and received (if used)			
Client details stored securely; privacy notice shared			
Kick-off date and contact person confirmed			
Welcome message sent: what happens next, who to call			
Follow-up check after first week			