WOOCOMMERCE

Client Onboarding Checklist

Welcome

- ☐ Provide a client intake form.
- ☐ Send basic information about your business (like office and help desk hours, information on how to access client accounts and settings, instructions on changing billing information, etc).
- ☐ Enter your client into a special email drip campaign that provides initial and ongoing information that may be important.

Legal

- ☐ Send non-disclosure agreements (NDAs).
- ☐ Include a service contract.

Financial

- ☐ Send or request tax forms (you may need to send clients a W-9 if you are in the United States).
- ☐ Add client information to your accounting and invoicing software.
- ☐ Document project-based estimates and/or ongoing hourly rates.
- ☐ Provide banking information to your client for ACH payments.
- ☐ Ask the client to put a card on file for automatic invoice payments.
- ☐ Prompt the client to sign up for a subscription service.

Communication and Project Management

- ☐ Add the client to your project management software, Slack channel, or other collaboration software (or join theirs).
- ☐ Create initial project and list of tasks.
- ☐ Assign tasks and add due dates.
- ☐ Configure labels for client emails.
- ☐ Create a schedule for project-related calls.
- ☐ Determine project leads and other points of contact within your business and on the client’s team, so conversations are directed at the correct individuals.

File sharing

- ☐ Share files with your client through their account on your website, a file sharing platform like Google Drive, or a secure third-party client portal software.
- ☐ Add your client and relevant team members to the file sharing environment.
- ☐ Request files from your client (e.g. brand guidelines, image assets, templates, and inspiration references).