

CLIENT ONBOARDING CHECKLIST

{{CLIENT_NAME}} · {{PROJECT_NAME}} · starting {{START_DATE}}

Field	Value
Client	{{CLIENT_NAME}}
Project	{{PROJECT_NAME}}
Start date	{{START_DATE}}
Primary contact	{{CLIENT_CONTACT}}
Approver	{{APPROVER_NAME}}

Work through this before delivery work starts. The first three sections block everything else: an unsigned agreement, an uncleared deposit and an unnamed approver are the three reasons a first week disappears.

1. Agreement

- ☐ Proposal or estimate accepted in writing
- ☐ Contract signed by both parties
- ☐ Scope of work attached and agreed
- ☐ Revision allowance confirmed
- ☐ Start date and target completion date agreed

2. Payment

- ☐ Deposit invoice sent
- ☐ Deposit received and cleared
- ☐ Billing entity and billing address confirmed
- ☐ Billing contact and email for invoices confirmed
- ☐ Client tax / VAT number obtained where required
- ☐ Purchase order number obtained, if the client uses them
- ☐ Payment terms and payment method confirmed

3. Contacts

- ☐ Primary day-to-day contact confirmed
- ☐ Named approver identified — the person who can sign things off
- ☐ Other stakeholders identified, with what each one approves
- ☐ Out-of-hours or emergency contact, if the work needs one
- ☐ Time zones noted for everyone involved

4. Project information

- ☐ Project goals confirmed in writing
- ☐ Success criteria agreed

- ☐ Known constraints and non-negotiables captured
- ☐ Existing research, analytics or prior work received
- ☐ Competitors or reference examples discussed

5. Access

- ☐ Required accounts identified, with the permission level each one needs
- ☐ Credentials received, or access granted to your own account
- ☐ Access confirmed working — actually logged in, not just received
- ☐ Shared drive or repository access granted
- ☐ Staging or test environment available
- ☐ Security requirements understood (MFA, VPN, device policy)

6. Assets

- ☐ Brand guidelines received, or confirmed not to exist
- ☐ Logo files received in usable formats
- ☐ Fonts received, with licences that cover this use
- ☐ Photography and imagery received
- ☐ Existing copy or content received
- ☐ Source files for anything being reworked received

7. Communication

- ☐ Main channel agreed (email, Slack, Teams, portal)
- ☐ Update frequency and format agreed
- ☐ Feedback process agreed — consolidated, from the named approver
- ☐ Feedback turnaround time agreed
- ☐ Meeting cadence set, with invitations sent
- ☐ Working hours and expected response times stated

8. Timeline

- ☐ Milestones confirmed and dated
- ☐ First deliverable date confirmed
- ☐ Client-side deadlines and fixed dates captured
- ☐ Known absences on both sides noted
- ☐ Dependencies and who owns each one agreed

9. Technical setup

- ☐ Tools and file formats agreed
- ☐ File naming and version conventions agreed
- ☐ Where deliverables will be handed over decided
- ☐ Backup and source-file arrangement understood
- ☐ Any required integrations or third-party services identified

10. Kickoff

- ☐ Kickoff meeting booked, with the approver attending
- ☐ Agenda sent in advance
- ☐ Scope, milestones and responsibilities walked through
- ☐ Questions and assumptions logged
- ☐ Notes and agreed actions sent afterwards in writing

11. Internal setup (for you, not the client)

- ☐ Project created in your own system, with the estimate attached
- ☐ Time tracking set up against this project
- ☐ Capacity checked — this project fits alongside your existing commitments
- ☐ Recurring invoice or milestone invoice dates scheduled
- ☐ Client folder created, with the contract and scope filed
- ☐ Key dates in your calendar, including the client-side ones

12. Client confirmation

- ☐ Scope and exclusions confirmed in writing
- ☐ Approver and approval process confirmed in writing
- ☐ Feedback turnaround confirmed in writing
- ☐ Payment schedule confirmed in writing
- ☐ What happens to out-of-scope requests explained and acknowledged

By discipline

Everything above applies to any freelance project. These are the additions worth having if the work is of a particular kind — delete the ones that are not yours.

If you are a designer

- ☐ Brand assets in vector formats, not screenshots
- ☐ Font licences confirmed for web, print or app use as applicable
- ☐ Design tool and handoff format agreed
- ☐ Accessibility requirements confirmed (contrast, target sizes, standard)
- ☐ Who implements the designs, and what they need from you

If you are a developer

- ☐ Repository access and branching convention agreed
- ☐ Environments identified — local, staging, production
- ☐ Deployment process and who is allowed to deploy confirmed
- ☐ Browser and device support agreed
- ☐ Existing tests, CI and code standards reviewed
- ☐ Third-party API keys and rate limits obtained

If you are a writer

- ☐ Tone of voice or style guide received, or confirmed not to exist
- ☐ Target audience and reading level agreed
- ☐ Word counts or length targets per piece agreed
- ☐ SEO requirements, keywords and internal linking rules confirmed
- ☐ Subject-matter experts identified and interviews booked
- ☐ Who fact-checks, and who has final editorial say

If you are a consultant

- ☐ Interview list agreed and introductions made
- ☐ Data and documents required identified, with an owner for each
- ☐ Confidentiality expectations confirmed, including what you may cite
- ☐ Reporting format and audience agreed
- ☐ Decision-making process understood — who acts on the recommendations

Notes

{{ONBOARDING_NOTES}}