

## SAMPLE CHECKLIST

# Client Onboarding Checklist Preview



A sample internal-page deliverable showing the structure and tone of the checklist section.

### Checklist: from signed client to kickoff

- ✓ Send welcome email
- ✓ Create client folder and naming convention
- ✓ Request intake materials
- ✓ Confirm access requirements
- ✓ Schedule kickoff
- ✓ Confirm next-step owner
- ✓ Flag missing items before handoff
- ✓ Confirm kickoff notes are stored in the right place

### Use notes

This kind of page is useful for operators who already know the workflow but need a cleaner execution layer. It reduces reliance on memory and makes handoff easier.

### Example edge case

If the client submits incomplete intake information, the onboarding owner pauses kickoff scheduling, sends the missing-items request, and logs the blocker before handoff.