Lamphills

# Client Onboarding Checklist

**1. Pre-Onboarding**

- ☐ Identify customer pains and solutions.
- ☐ Define big-picture campaign goals.
- ☐ Agree on mutual deliverables.

**2. After Signing**

- ☐ Send a welcome message with the next steps and timeline.
- ☐ Schedule a call to welcome the client and organize the kick-off call.

**3. Kick-Off Call**

- ☐ Collect information about the client’s internal process.
- ☐ Confirm the client’s definition of success.
- ☐ Revisit and confirm the deliverables.
- ☐ Reinforce the value your team provides.
- ☐ Outline action items for both parties, including responsibilities and deadlines.

**4. Post Kick-Off Meeting**

- ☐ Revisit and align with the client’s definition of success.
- ☐ Create a service-level agreement (SLA).
- ☐ Agree on smaller milestones to track progress.

**5. After Onboarding**

- ☐ Continue establishing trust with the client.
- ☐ Notify the client of milestones achieved and tasks completed.
- ☐ Ask for feedback to identify and address small issues.
- ☐ Complete a health check report post-call to monitor customer sentiment.