SUITE MAVERICK RESOURCE HUB

CLIENT ONBOARDING CHECKLIST

From “yes” to fully onboarded—without the client wondering what happens next.

01 | THEY SAY YES

- ☐ Contract sent
- ☐ Contract signed
- ☐ Invoice/payment sent
- ☐ Payment confirmed
- ☐ Client record created
- ☐ Internal team notified

02 | WELCOME

- ☐ Welcome email sent
- ☐ Primary point of contact established
- ☐ Communication expectations provided
- ☐ Client portal/folder created
- ☐ Necessary access requested
- ☐ Kickoff scheduled

03 | COLLECT

- ☐ Intake questionnaire
- ☐ Brand/business information
- ☐ Login/access requirements
- ☐ Existing documents
- ☐ Project assets
- ☐ Key contacts
- ☐ Deadlines/milestones

04 | INTERNAL SETUP

- ☐ CRM updated
- ☐ Project created
- ☐ Tasks assigned
- ☐ Calendar dates added
- ☐ Folder structure created
- ☐ Automations triggered
- ☐ Recurring follow-ups scheduled

THE CLIENT SHOULD ALWAYS KNOW

- ☐ What happens next?
- ☐ Who owns what?
- ☐ When will I hear from you?
- ☐ Where do I find things?
- ☐ How do I get help?

CEO-ISH BEHAVIOR

A premium client experience isn't created by doing more. It's created by removing uncertainty.

SUITE MAVERICK | EXECUTIVE SERVICE PARTNERSHIP

Suite Maverick LLC.
Executive Operations Partnership

Your business doesn't need more busy.
It needs better operations.