

Client Onboarding SOP Template

A simple, clean, ready-to-use workflow for welcoming new clients with clarity, confidence, and consistency.

Business Name: _____	Client Name: _____
Project / Service: _____	Start Date: _____

Purpose

This SOP helps small business owners create a smooth, repeatable onboarding experience for every new client. Strong onboarding builds trust early, confirms expectations, collects the right information, and helps projects start with fewer delays or misunderstandings.

Overview

Use this template to guide the full onboarding process from client confirmation through kickoff, first deliverable setup, communication expectations, and post-onboarding follow up. Customize each section for your services, timeline, tools, and client experience.

Tools Needed

- Client intake form or questionnaire
- Signed proposal, contract, or service agreement
- Invoice or payment confirmation
- Project management tool: _____
- Shared file folder or client portal: _____
- Communication channel: _____
- Kickoff call link or meeting location: _____
- Brand assets, logins, documents, or access needed to begin

Pre-Onboarding Checklist

- ☐ Confirm client is a good fit for the service.
- ☐ Send proposal, contract, and invoice.

- ☐ Confirm signed agreement and payment status.
- ☐ Create client folder, project board, or workspace.
- ☐ Send welcome email with next steps.
- ☐ Share intake form and due date.
- ☐ Schedule kickoff call or meeting.
- ☐ Note any deadlines, special requests, or risks.

Client Intake Steps

1. Send the client intake form with a clear deadline.
2. Collect business details, goals, target audience, service needs, and key contacts.
3. Request required files, brand assets, credentials, links, or permissions.
4. Review responses for missing information or unclear answers.
5. Follow up with one concise message listing anything still needed.
6. Save all client information in the shared folder, CRM, or project workspace.

Kickoff Preparation

- ☐ Review contract, project scope, timeline, and client goals.
- ☐ Review intake form responses and prepare clarifying questions.
- ☐ Confirm the meeting date, time, link, and attendees.
- ☐ Prepare kickoff agenda and share it before the meeting.
- ☐ Set up project workspace, folders, and first tasks.
- ☐ Identify the first deliverable and any inputs required.

Kickoff Call Agenda

1. **Welcome and introductions** — Confirm who is involved and each person's role.
2. **Goals and success measures** — Review what the client wants to achieve.
3. **Scope and deliverables** — Confirm what is included, what is not included, and approval points.
4. **Timeline and milestones** — Review deadlines, review windows, and key dates.
5. **Communication process** — Confirm channels, response times, and meeting rhythm.
6. **Next steps** — Assign immediate action items and confirm due dates.

First Deliverable Setup

- Review the agreed scope and confirm the first deliverable.

- Gather any required source files, examples, logins, brand guidelines, or approvals.
- Create the first draft, setup file, or working document in the correct format.
- Share the expected delivery date and review instructions with the client.
- Document any assumptions or decisions that may affect the timeline or outcome.

Communication Expectations

Communication Area	Expectation
Primary Channel	_____
Response Time	Messages are typically answered within _____ business days.
Meetings	Meetings will be scheduled as needed or every _____.
Feedback	Client feedback should be shared in one place by the agreed deadline.
Approvals	Work moves forward after written approval or confirmation.

Post-Onboarding Follow Up

- ☐ Send a short recap of kickoff decisions, action items, and due dates.
- ☐ Confirm the first deliverable timeline and review process.
- ☐ Check that the client has access to all shared tools, folders, and links.
- ☐ Ask the client to confirm that goals, expectations, and next steps are clear.
- ☐ Record notes, risks, and preferences in the client file.
- ☐ Schedule the next check-in or milestone review.