CLIENT OPERATIONS

Client onboarding checklist

A clear first-week checklist for welcoming a new client, collecting what you need, and starting work without loose ends.

A practical worksheet from Stelaah

Use it, adapt it, and save it with the client work it supports.

HOW TO USE THIS

A new client has signed, but the handoff from sale to delivery feels scattered.

WORK THROUGH THE CHECKLIST

- [ ] 01 **Confirm agreement and payment**
- [ ] 02 **Send welcome and timeline**
- [ ] 03 **Collect goals, access, and assets**
- [ ] 04 **Create the project and owners**
- [ ] 05 **Book the kickoff**
- [ ] 06 **Share the client workspace**

Before you close this

Name one owner, one next action, and one date. A worksheet only helps when the next commitment is visible to the people doing the work.

Notes and decisions

Use this page to record what changes after you work through the checklist.