



## CLIENT OPERATIONS

# Client portal launch checklist

A checklist for setting up a client-facing home that is clear, useful, and easy to return to during delivery.

A practical worksheet from Stelaah

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

## HOW TO USE THIS

You are giving a client access to a shared project space.

## WORK THROUGH THE CHECKLIST

- ☐ 01 **Add the right contacts**  
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\_\_\_\_\_
- ☐ 02 **Publish the project summary**  
\_\_\_\_\_  
\_\_\_\_\_
- ☐ 03 **Share the timeline**  
\_\_\_\_\_  
\_\_\_\_\_
- ☐ 04 **Add current files**  
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\_\_\_\_\_
- ☐ 05 **Explain approvals and requests**  
\_\_\_\_\_  
\_\_\_\_\_
- ☐ 06 **Send a simple welcome note**  
\_\_\_\_\_  
\_\_\_\_\_

### 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.

This practical workflow resource is not legal, financial, tax, or security advice. Adapt it to your team and circumstances.