



SALES AND FINANCE

Vendor onboarding checklist

A checklist for bringing a contractor or vendor into a client engagement with the right brief, access, terms, and accountability.

A practical worksheet from Stelaah

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

HOW TO USE THIS

Outside help is joining a project.

WORK THROUGH THE CHECKLIST

- ☐ 01 **Confirm scope and rate**

- ☐ 02 **Share relevant context**

- ☐ 03 **Set access boundaries**

- ☐ 04 **Agree delivery dates**

- ☐ 05 **Name the review owner**

- ☐ 06 **Store agreement and contact details**

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.