**CLIENT ONBOARDING TEMPLATE**

This Client Onboarding Template is designed to give your SME a clear, professional, and repeatable process for welcoming new clients. It enhances your brand, ensures smooth communication, and sets the tone for a productive working relationship.

1. Welcome Message Template

Dear [Client Name],

Welcome to [Your Company Name]. We’re excited to have you onboard and look forward to delivering exceptional results.

Our team will work closely with you to ensure all goals are met, timelines are respected, and communication remains open.

Thank you for trusting us.

Warm regards,

[Your Name]

[Your Position]

2. Client Information Sheet

|  |  |
| --- | --- |
| Client Company Name | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Client Contact Person | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Phone Number | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Email Address | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Address | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Project Type | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Start Date | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

3. Scope of Work Outline

Describe the nature of the project or service below:

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4. Onboarding Checklist

✓ Client brief received

✓ Signed contract or agreement

✓ Initial invoice sent and payment confirmed

✓ Project kickoff call scheduled

✓ Point of contact established from both ends

✓ File sharing protocol or tools discussed

5. Communication Plan

We will maintain clear and regular communication throughout the project via:

- Email - WhatsApp/Slack (if agreed)

- Weekly Zoom/Google Meet check-ins

You will be assigned a dedicated account manager for support and coordination.