# BOSS BABE CLIENT ONBOARDING CHECKLIST

✅ <u>PRE-ONBOARDING (BEFORE YOU SIGN A CLIENT)</u>
- DEFINE YOUR CLIENT'S ONBOARDING PROCESS (STEPS + TIMELINE).
- CREATE A WELCOME PACKET WITH KEY INFO (SERVICES, EXPECTATIONS, FAQS).
- SET UP CONTRACTS AND AGREEMENTS FOR EASY DIGITAL SIGNING.
- PREPARE AN INVOICE SYSTEM FOR PAYMENTS.

✅ <u>CLIENT WELCOME (IMMEDIATELY AFTER SIGNING)</u>
- SEND A PERSONALIZED WELCOME EMAIL WITH THE NEXT STEPS.
- SHARE A CLIENT INTAKE FORM TO GATHER KEY DETAILS.
- SCHEDULE A KICKOFF MEETING OR FIRST SESSION.
- PROVIDE ACCESS TO ANY CLIENT PORTALS, GUIDES, OR RESOURCES.

✅ <u>COMMUNICATION & ORGANIZATION</u>
- ESTABLISH CLEAR COMMUNICATION CHANNELS (EMAIL, SLACK, ETC.).
- SET CLIENT EXPECTATIONS (RESPONSE TIMES, DELIVERABLES, MILESTONES).
- USE A PROJECT MANAGEMENT SYSTEM (ASANA, TRELLO, CLICKUP) TO TRACK PROGRESS.

✅ <u>DELIVERING YOUR SERVICE/PRODUCT</u>
- OUTLINE THE CLIENT JOURNEY (MILESTONES, DELIVERIES, DEADLINES).
- AUTOMATE RECURRING TASKS WHERE POSSIBLE (REMINDERS, FOLLOW-UPS).
- CHECK IN REGULARLY TO ENSURE CLIENT SATISFACTION.

✅ <u>OFFBOARDING & FOLLOW-UP</u>
- DELIVER FINAL DELIVERABLES AND CONFIRM PROJECT COMPLETION.
- REQUEST FEEDBACK OR A TESTIMONIAL.
- OFFER ADDITIONAL SERVICES OR UPSELL OPPORTUNITIES.
- SEND A THANK-YOU GIFT OR NOTE TO LEAVE A LASTING IMPRESSION.