SMALL BUSINESS

Prepare a consistent welcome

Create a calm first impression before the client needs to ask what happens next.

CLIENT ONBOARDING PLAYBOOK

BUILD YOUR WELCOME PACKET

Prepare one reusable packet with a warm introduction, project timeline, communication norms, and the next action. Personalize the names and project details, but keep the process predictable.

- [ ] Send the packet within one business day of confirmation.
- [ ] Name the project lead and the best contact channel.
- [ ] State the first deadline and what the client should provide.
- [ ] Link to approved folders, forms, and meeting invitations.

EXAMPLE

Welcome note: ·Thanks for choosing us. Your kickoff is Tuesday at 10:00. Before then, please complete the goals form and upload your current logo files to the shared folder.·

PUT IT INTO PRACTICE

What would make a new client feel oriented in the first five minutes?

Which recurring question belongs in the welcome packet?

This guide offers general operational guidance, not legal, privacy, security, tax, or financial advice. Use agreements and data-handling practices appropriate to your location, industry, and client requirements.

SMALL BUSINESS

Confirm the agreement

Turn a promising conversation into a shared written understanding.

CLIENT ONBOARDING PLAYBOOK

CAPTURE THE PROJECT BASICS

Before work starts, document the goal, deliverables, boundaries, timeline, fee, payment terms, and approval process. Use the current agreement approved for your business; do not rely on informal recollection.

- [ ] Use the legal names and correct project dates.
- [ ] List included deliverables in concrete terms.
- [ ] Identify client dependencies and feedback dates.
- [ ] Record the written approval that authorizes work to begin.

EXAMPLE

Scope line: ·Two landing-page drafts, one consolidated revision round, and final copy in a shared document; photography and web development are excluded.·

PUT IT INTO PRACTICE

What result is the client buying, and what is outside this engagement?

What decision or material could delay the schedule?

SMALL BUSINESS

Learn the client?s context

Ask focused questions so the work reflects real priorities rather than assumptions.

CLIENT ONBOARDING PLAYBOOK

RUN A DISCOVERY WORKSHEET

Use a short agenda to learn the audience, desired outcome, constraints, existing materials, and measures of success. Listen for exact customer language and confirm your notes in a recap.

- [ ] Ask what has already been tried and what happened.
- [ ] Request examples of work they consider successful.
- [ ] Separate urgent needs from useful future ideas.
- [ ] Name one measurable or observable success signal.

EXAMPLE

Discovery note: ·Audience: first-time visitors. Success: fewer basic booking questions. Constraint: launch before the June event.·

PUT IT INTO PRACTICE

Whose experience should improve when this project succeeds?

What evidence will tell us the work is useful?

SMALL BUSINESS

Set communication and approval rules

Make decisions easier by agreeing on channels, owners, and response windows.

CLIENT ONBOARDING PLAYBOOK

CREATE A WORKING RHYTHM

Choose one primary place for project decisions and one person who consolidates client feedback. State meeting cadence, expected response time, and how a change request will be evaluated.

- [ ] List the decision maker and backup contact.
- [ ] Schedule key reviews before production begins.
- [ ] Ask for consolidated comments rather than conflicting edits.
- [ ] Send a dated recap after every material decision.

EXAMPLE

Working agreement: ·Use the project board for requests; Maya combines feedback by Thursday. We meet every other Wednesday, and changes affecting scope receive a written estimate.·

PUT IT INTO PRACTICE

Where can both sides find the latest approved decision?

Who can give final approval when several people comment?

SMALL BUSINESS

Share files and access safely

Provide only the access needed for the task and protect both parties? information.

CLIENT ONBOARDING PLAYBOOK

PRACTICE ACCESS HYGIENE

Use named accounts, role-based permissions, secure sharing links, and multi-factor authentication where available. Never ask a client to send a password, secret key, recovery code, or full payment-card information by email or chat; use an approved access method instead.

- [ ] Grant the minimum permission and set an expiry when practical.
- [ ] Keep client files in the designated, access-controlled workspace.
- [ ] Verify a recipient before sharing sensitive material.
- [ ] Remove access promptly when a role or project ends.

EXAMPLE

Instead of requesting a website password, ask the client to invite your named work email as an editor through the platform·s user-management page.

PUT IT INTO PRACTICE

What is the least access required to complete this step?

Who should review and remove access at project close?

SMALL BUSINESS

Launch with a documented kickoff

Use the first working meeting to convert plans into assigned next actions.

CLIENT ONBOARDING PLAYBOOK

LEAD A PRACTICAL KICKOFF

Review the agreed scope, goals, timeline, materials, risks, and communication plan. End with owners and dates for every immediate action, then send a concise written record.

- [ ] Restate the outcome and deliverables in plain language.
- [ ] Check that needed source files and permissions are available.
- [ ] Identify one risk and an escalation contact.
- [ ] Confirm the next review date before ending the meeting.

EXAMPLE

Kickoff recap: ·Jordan sends product notes by May 4; we deliver the outline May 8; Priya approves or consolidates feedback by May 10.·

PUT IT INTO PRACTICE

What must happen this week for the project to move safely?

What risk should be surfaced now rather than later?

SMALL BUSINESS

Review the first two weeks

Check the onboarding experience while it can still improve the project.

CLIENT ONBOARDING PLAYBOOK

USE A SHORT HEALTH CHECK

Ask whether the client understands progress, knows where to find materials, and has unresolved questions. Compare actual progress with the plan, correct friction, and keep a private process note for future onboarding.

- [ ] Confirm the client received the promised welcome materials.
- [ ] Review open decisions, dependencies, and upcoming deadlines.
- [ ] Ask for one improvement to the working process.
- [ ] Record a reusable lesson without storing unnecessary personal data.

EXAMPLE

Health-check question: ·On a scale of one to five, how clear are the next steps? What one change would make collaboration easier this week?·

PUT IT INTO PRACTICE

Which part of onboarding created confidence or confusion?

What one template or checklist should be improved next time?