

New Client Onboarding

CLIENT & COMPANY NAME

DATE

MAIN TASKS & REQUIREMENTS

For example, email management, research, customer support, and social media.

- Do any of these tasks need to be done at specific times each day?

TOOLS & SOFTWARE

- Email system - Google Apps
- Calendar – Outlook
- Social Media - Hootsuite
- Etc....

MANUALS, FAQs, & SUPPORT DOCUMENTATION

- Are there any manuals available?
- How are they accessed?
- Do they need to be updated?

FILE SHARING

- Does the client use systems such as Dropbox or Google drive?

SHARING PASSWORDS

- Does the client already use a password sharing tool?

COMMUNICATION

- What is the client's preferred method on communications for day to day work?
- How should you communicate if something urgent comes up?
- What is the preferred tool for meetings?

AVAILABILITY

- Timezone?
- Any particular requirement?

NEXT STEPS

Action -

Action -

Action -

Action -

Action -