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# New Client Onboarding

## *TEMPLATE*

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*This onboarding template will help you articulate, and define the scope of the work to gain further clarity on your client's expectations. It's also a great time to define your responsibilities for the work, and the position.*

### 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 Dropbox or Google drive?

## SHARING PASSWORDS

- Does the client use tools such DashLane or Passpack?

## 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 (Skype, Google Hangout, etc...)

## AVAILABILITY

- Timezone?
- Any particular requirement?

## NEXT STEPS

*Action -*

*Action -*

*Action -*

*Action -*

*Action -*