### **Client Onboarding List**

#### **1. Client Details**

* **Client Name**: [Full Name or Company Name]
* **Contact Person**: [Name and Role]
* **Email Address**: [Primary Email]
* **Phone Number**: [Primary Contact Number]

#### **2. Onboarding Steps**

* **Contract Signed**: [Yes/No; Date]
* **Initial Meeting Scheduled**: [Date and Time]
* **Documentation Completed**: [Yes/No]
* **Platform/Tool Access Provided**: [Yes/No]
* **Training Scheduled**: [Date and Details]

#### **3. Assigned Team**

* **Account Manager**: [Name]
* **Onboarding Specialist**: [Name]
* **Support Contact**: [Name/Email]

#### **4. Timeline**

* **Onboarding Start Date**: [Date]
* **Onboarding Completion Date**: [Projected Date]
* **Milestones Achieved**: [Yes/No; List]

#### **5. Notes**

* **Special Requests**: [Client's preferences or unique requirements]
* **Action Items**: [Pending tasks for onboarding]