

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]