Crabtree & Associates, LLC

Client Onboarding Checklist

A smooth onboarding process helps set clear expectations, build trust, and start your client relationship off on the right foot. Use this checklist to stay organized and ensure you gather everything you need from new clients in a timely and professional way.

Initial Contact & Welcome

- ☐ Send welcome email with brief overview of services
- ☐ Schedule a kickoff call or meeting
- ☐ Send client intake form
- ☐ Collect contact details, preferred communication method, and business info

Agreements & Documentation

- ☐ Send and receive signed engagement letter or service agreement
- ☐ Send invoice or set up payment plan
- ☐ Set up client folder (digital or physical)
- ☐ Collect EIN, business entity docs, and prior year tax returns if applicable

Account Setup & Access

- ☐ Request access to QuickBooks or other bookkeeping software
- ☐ Obtain logins or view-only access to financial accounts (if needed)
- ☐ Confirm software tools used (e.g., Google Drive, email, Slack, etc.)
- ☐ Create shared folder or workspace for document uploads

Kickoff & Workflow

- ☐ Review scope of services and deliverables
- ☐ Confirm monthly or weekly deadlines
- ☐ Explain how to share receipts, reports, or updates
- ☐ Set up recurring tasks or check-ins

Final Touches

- ☐ Send thank-you or welcome gift (optional)
- ☐ Add client to email list or internal CRM
- ☐ Schedule first review or progress check-in
- ☐ Ask for feedback on the onboarding experience