TEMPLATE

CLIENT ONBOARDING CHECKLIST

YOUR LOGO

Use this checklist for every new customer so each job starts the same professional way.

BEFORE THE FIRST VISIT

- [ ] Contact details recorded in the CRM
- [ ] Scope of the job confirmed in writing
- [ ] Site address, access and parking noted
- [ ] Pets, alarms and special instructions noted
- [ ] Quote sent and accepted
- [ ] Deposit received (if required)
- [ ] Start date and arrival window confirmed
- [ ] Welcome message sent with who to contact

KICKOFF

- [ ] Introduce the crew lead
- [ ] Walk the site with the customer
- [ ] Confirm what will be protected and how
- [ ] Agree how updates will be shared
- [ ] Confirm change-order process and pricing

DURING THE JOB

- [ ] Daily or weekly update sent
- [ ] Photos taken: before, during and after
- [ ] Changes approved in writing
- [ ] Site left clean and safe each day

FINISHING

- [ ] Final walk-through with the customer
- [ ] Warranty and care information handed over

- [ ] Final invoice sent
- [ ] Review request sent
- [ ] Follow-up call scheduled

NOTES

CUSTOMER

JOB

CREW LEAD

NOTES