



NEW CLIENT ONBOARDING

Client's Name

Client's Email

Client's Phone Number

Client's Address

**Emergency Contact
Information**

Project Name

Scope of the Project

Client Onboarding Checklist

Onboarding Journey

To Do	Assignee	Comments
<ul style="list-style-type: none">Collection of necessary documents		
<ul style="list-style-type: none">Signing of contracts		
<ul style="list-style-type: none">Creation of meeting calendar		
<ul style="list-style-type: none">Information training on data security		
<ul style="list-style-type: none">Determination of current targets		
<ul style="list-style-type: none">Creating a new business plan		
<ul style="list-style-type: none">Planning Ongoing Support		

Payment Principles

Within the scope of the Agreement with the Client, the total price for the project and related services to be provided is _____.

Payment will be due in three installments. The first installment of 40% will be due upon project completion, the second installment of 30% will be due 30 days after project completion, and the final installment of 30% will be due 60 days after project completion.

Interest of 2% per month will be added to any late payments. Payments will be made via direct bank transfer. If there are any additional expenses incurred during the project, these shall be discussed and agreed upon by both parties prior to incurring said expenses.

Client Onboarding Checklist

✓ Client-based specific occasions (If any)

✓ Additional requests of the Client (If any)

Supervisor/Manager

Client



This document is a PDF copy of **New Client Onboarding Checklist** template. You can edit it with **Jotform Sign** and convert to an eSign document with **Jotform Sign**.



Learn More About Jotform PDF Products

Jotform offers powerful PDF solutions. Check them out below.

Jotform PDF Editor

Turn form submissions into PDFs automatically ready to download or save for your records.

jotform.com/products/pdf-editor/



Smart PDF Forms

Convert your PDF files into online forms that are easy to fill out on any device.

jotform.com/products/smart-pdf-forms/



Jotform Sign

Collect e-signatures with Jotform Sign to automate your signing process.

jotform.com/products/sign/



These templates are suggested forms only. If you're using a form as a contract, or to gather personal (or personal health) info, or for some other purpose with legal implications, we recommend that you do your homework to ensure you are complying with applicable laws and that you consult an attorney before relying on any particular form.