

Client Onboarding Checklist for Freelancers



Position yourself to deliver the **best results** and create positive expectations for your clients. Follow these steps to guarantee a smooth onboarding process and **faster integration** into your client's operations.

Complete final paperwork & double check contracts

Schedule a kickoff meeting to review the project

Define turnaround times & project deliverables

Discuss potential challenges & contingency plans

Discuss best practices for administrative functions (billing, timesheets, etc.)

Establish points of contact for questions, feedback & milestones

Establish when, how & how often you will communicate

Gain access to necessary systems & software

Request internal resources & schedule necessary system trainings

Identify working style & team culture for collaborative projects