



Onboarding New Clients

The onboarding process sets the tone for the entire client relationship.

It is often the client's first experience working with you after the sale. A thoughtful onboarding process builds confidence, establishes expectations, and creates a clear path forward.

Clients should leave the onboarding process with a clear understanding of how the service works, what happens next, and how to get started.

The Four Goals of Client Onboarding

1. Gather The Information You Need

Before a service can be delivered effectively, the necessary information must be collected.

Depending on the service being provided, this may include:

- Business name, address, and phone number
- Primary contact information
- Preferred method of communication (email, text, or phone)
- Promotions and offers
- Subscriber lists
- Signed agreements
- Billing information

Taking the time to gather complete and accurate information helps create a smoother launch process and reduces delays later.

2. Explain How The Service Works

Clients should understand how the service operates and how they will interact with you moving forward.

Topics may include:

- How campaigns are submitted
- Communication channels
- Turnaround times
- Approval processes
- Support procedures

Providing this information early helps create a consistent experience and reduces confusion as the relationship develops.

3. Establish Expectations

Successful client relationships are built on clear expectations.

Clients should understand:

- What responsibilities belong to them
- What responsibilities belong to you
- Notice requirements for campaign requests
- Expected response times
- The scope of the service

When expectations are clearly established, communication becomes easier and the relationship is more likely to remain productive.

4. Create A Clear Path To Launch

One of the most important goals of onboarding is helping the client understand what happens next.

Clients should know:

- Any remaining setup requirements
- Expected timelines

- When the first campaign will be created or sent
- The next scheduled communication

A successful onboarding process should leave the client with confidence and a clear understanding of the next steps.

TIP

Consider creating a Client Welcome Guide that explains how your service works, how campaigns are submitted, communication expectations, support procedures, and what happens after onboarding.

Providing this information in writing helps create a consistent onboarding experience for every client.

COMMON MISTAKE

Assuming clients understand how the service works.

Even experienced business owners may be unfamiliar with your process, communication preferences, or service model. Taking the time to explain how the relationship will operate can prevent confusion and improve the client experience.

KEY TAKEAWAY

The onboarding process is more than a setup checklist. It is an opportunity to establish trust, create clarity, and build confidence from the beginning.

When clients understand how the service works and what to expect next, the relationship starts on a stronger foundation.

