

FREE ONBOARDING CHECKLIST

The Client *Onboarding* Checklist.

The 10 steps that turn a new booking into a smooth, professional client experience from day one.

FREE DOWNLOAD

A QUICK WORD

The first week after a client says yes sets the tone for everything that follows. Handle it with structure and they relax, trust you, and stop second-guessing. Handle it loosely and they grow anxious, message constantly, and micromanage every detail.

This checklist gives you a professional onboarding, every time. Work through these ten steps with every new client, and you will start each project calm, organised, and clearly in control.

FOR EVERY NEW CLIENT, IN ORDER

- ☐ Send a warm welcome message confirming they are officially booked
- ☐ Send your agreement or contract and get it signed before any work begins
- ☐ Collect the deposit and confirm receipt in writing
- ☐ Share a simple overview of what happens next and when
- ☐ Set clear communication expectations: your hours and response times
- ☐ Gather all the key event details in one organised place
- ☐ Confirm the single decision-maker for approvals
- ☐ Book your first proper planning conversation
- ☐ Send a short list of what you need from them, with deadlines
- ☐ Set the date for your next check-in, so they always know what is coming

ONE MORE THING

You are *ready.*

Do these ten things and your client will feel, from the very first week, that they made the right choice. That feeling is what turns one booking into referrals.

The complete client operations system, with every template from enquiry to offboarding, lives inside the Event Business Sanity Kit. When you are ready to systemise the whole client journey, it is waiting for you at thediaryofaneventgirl.com.

Structure with soul. Strategy with personality. Experiences with intention.

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