STRETCHLEARN · WORKBOOK

Client Onboarding Systems — Workbook

This workbook turns the course into a working onboarding machine you run on every new client. Complete each section as you finish the matching module, and by the end you will have a mapped onboarding journey, a welcome sequence and welcome packet, an intake questionnaire and asset checklist, a communication agreement, a kickoff agenda and recap, and an early-check-in cadence. Use the templates to track each client through onboarding, build your welcome packet, and never miss a step.

Why Onboarding Decides the Whole Engagement

Map the onboarding journey, decide your timing for each touchpoint, and lock the three definitions that prevent most disputes.

Worksheet: Map Your Onboarding Journey

Write out every touchpoint from the moment a client signs to the moment real work begins. For each step, note what happens, who triggers it, and when it is due relative to signing. Use the Onboarding Tracker template to turn this into a reusable checklist.

Step 1 trigger and timing (agreement signed, deposit invoice sent)

Instant confirmation message: who sends it and within how many hours

Deposit cleared: what unlocks once it does

Welcome packet delivered: due how long after signing

Intake questionnaire and asset request: due date relative to kickoff

Access and workspace setup: what gets created

Kickoff meeting: how many business days after signing

Recap and first work block: trigger to begin

Exercise: Diagnose Your Last Onboarding

Think back to your most recent new client. Walk through what actually happened in the first two weeks and find the gaps. Be honest about dead air and firehose moments.

- How long was the silence between the client signing and your first meaningful contact?
- What information or asset did you end up waiting on that you could have collected up front?

• Where did the client seem unsure, anxious, or confused, and what caused it?

• Which single onboarding step, if added, would have prevented the most friction?

Worksheet: Lock the Three Definitions

Before any work starts on your next project, settle roles, the definition of done, and the single point of contact. Fill this in and confirm it with the client during kickoff.

Single point of contact on the client side (one named person)

Single approver who can say yes to the work

Responsible / Accountable / Consulted / Informed for key deliverables (RACI)

Definition of done: the concrete outcome that exists at the end

Acceptance criteria: how the client knows it is complete

Explicitly out of scope (so completion is not deferred forever)

Checklist: Foundation Readiness Checklist

[ ] I have a written onboarding journey from signed to kickoff
[ ] Each step has an owner and a due time relative to signing
[ ] I have designed against both dead air and the firehose
[ ] I require a single point of contact and a single approver
[ ] I agree a definition of done before any work begins

The Welcome Experience and Expectation Setting

Build the welcome sequence, the welcome packet, and the communication agreement that turn doubt into confidence in the first 48 hours.

Worksheet: Write Your 48-Hour Welcome Sequence

Draft the five messages of your welcome sequence so each does one job and points to the next. Save them as templates you personalize per client. Aim for the first touch within two hours of signing.

Message 1 (within 2 hours): thank-you, confirmation, one-line preview of next step

Message 2 (same day): welcome packet and deposit invoice, how to pay

Message 3 (on deposit cleared): officially underway, intake questionnaire sent

Message 4 (with intake): asset and access request, due date, kickoff booking link

Message 5 (day before kickoff): agenda, call link, anything still outstanding

Tool that will automate or store these (Dubsado, HoneyBook, Bonsai, email snippets)

Exercise: Build Your Welcome Packet

Draft the welcome packet you will send every new client. Restate, in friendly language, the same boundaries that live in your contract. Build it once in Canva, Google Docs, or Notion and reuse it. The Welcome Packet Builder template gives you the section structure.

• How will you restate the outcome the client is buying in one warm paragraph?

• What are your process stages from kickoff to delivery, in plain language?

• What will you list under 'what I need from you and when'?

• Which five questions do clients always ask that you will pre-answer in the FAQ?

Worksheet: Communication Agreement

Decide how and when you and the client will communicate, framed as a two-way agreement. Write this into your welcome packet so it is documented, not just spoken.

Primary channel (email, Asana, Trello, shared Slack) — one source of truth

Your working hours and days

Your standard response time (for example, within one business day)

Feedback turnaround you need from the client (for example, within three business days)

Meeting cadence (weekly check-in, milestone reviews, or async only)

How urgent is flagged versus routine

Checklist: Welcome Experience Checklist

[ ] My first contact reaches the client within two hours of signing
[ ] Each welcome message asks for one clear thing and points to the next
[ ] I have a reusable, branded welcome packet
[ ] The packet restates scope, revisions, payment, and turnaround in plain language
[ ] I set a two-way communication agreement and put it in writing

Intake, Assets, and Information Gathering

Build the intake questionnaire, the asset-and-access checklist, and the shared workspace so nothing stalls the project before kickoff.

Worksheet: Design Your Intake Questionnaire

Build the intake form you send right after the deposit clears. Every question should change how you do the work. Use open questions for thinking and closed questions for clean decisions. Build it in Google Forms, Typeform, or your client tool.

Goals question (what does success look like and how is it measured)

Audience question (who is this for and what should they think, feel, or do)

Background question (what has been tried, what worked, what did not)

Constraints question (deadlines, budget, brand rules, technical or legal)

References question (examples they like and dislike, and why)

Stakeholders question (who is involved, who approves, who is informed)

Logistics question (assets they hold, access to grant, key dates)

Worksheet: Asset and Access Request

List exactly what you need the client to send before kickoff, with the format and a due date. Give them one organized destination. Use the Asset and Access tab of the Onboarding Tracker to chase missing items.

Brand assets needed (logos in usable formats, guidelines, fonts, colors)

Content needed (copy, product details, specifications, data)

Access or logins to grant, and how

References and competitor examples to provide

Internal approvals the client must have in hand

Single destination for delivery (shared folder, Content Snare, upload field)

Due date tied to kickoff (for example, two days before)

Exercise: Stand Up the Shared Workspace

Set up the environment the project will live in before kickoff, matched to the client's sophistication. The goal is one obvious place for the client to find the answer to 'where are we'.

• Where will files live, and how will folders be named so a stranger could navigate them?

• What project hub (Asana, Trello, Notion, ClickUp, Basecamp) or simple status email fits this client?

• How will you set permissions so the client sees what they need and nothing they should not?

• How will you orient the client to where everything lives, ideally at kickoff?

Checklist: Intake and Setup Checklist

[ ] I have a reusable intake questionnaire and every question earns its place
[ ] I send the intake right after the deposit clears
[ ] I have an asset and access checklist with formats and a due date

[ ] Clients deliver everything to one organized destination
[ ] The shared workspace is set up and the client is oriented before work begins

The Kickoff and the First 90 Days

Run the kickoff, capture it in a written recap, transition cleanly into the work, and build the early check-ins that turn a new client into a repeat one.

Worksheet: Build Your Kickoff Agenda

Prepare the agenda for your next kickoff and send it in advance. Assign a note-taker. Use this to reinforce boundaries warmly and close each topic with a single clear decision.

Introductions and roles (who is in the room, single point of contact)

Goals and success (restate the outcome and how it is measured)

Scope and definition of done (what is in, what is out, what finished looks like)

Timeline and milestones (schedule, review points, who delivers what when)

Process and communication (how work, feedback, and approvals flow)

Open questions and risks to surface now

Next steps (immediate actions, owners, dates)

Exercise: Write the Kickoff Recap

Within a day of the kickoff, send a written recap that turns the conversation into a shared plan. Close with a request for confirmation so it becomes an agreed record.

• What confirmed goals, scope, and definition of done will you restate?

• Which decisions made in the meeting need to be on the record, and which questions remain open?

• What are the action items with owners and due dates for both sides?

• What is the one-line confirmation request that turns this recap into an agreed baseline?

Worksheet: Plan the First 90 Days

Lay out the early-engagement cadence that keeps momentum, catches problems early, and sets up repeat work. Schedule these touchpoints now, before the work absorbs your attention.

First visible progress or status (within the first week)

First milestone review date and how feedback will be gathered

30-day check-in on how the engagement feels, not just deliverables

Mid-project pulse to reconfirm scope, timeline, and satisfaction

Pre-delivery alignment to reconfirm the definition of done

When you will ask for feedback, a testimonial, and a referral

The clear next step you will offer (retainer, future phase, check-in)

Checklist: Kickoff and Early-Engagement Checklist

[ ] I run a structured kickoff once contract, deposit, and intake are complete
[ ] I send a written recap within a day and ask the client to confirm it
[ ] I transition into the work with a visible first checkpoint and the agreed cadence
[ ] I have a 30-60-90 early-check-in rhythm scheduled
[ ] I capture a testimonial and ask for a referral once trust is established
[ ] I feed what I learned back into my onboarding system for the next client

Your Action Plan

1. Map your onboarding journey from signed to kickoff with an owner and timing for every step
2. Settle the three definitions: single point of contact, single approver, and definition of done
3. Write a five-message welcome sequence and save it as reusable templates
4. Build a branded welcome packet that restates scope, revisions, payment, and communication
5. Set a two-way communication agreement and put it in the welcome packet
6. Create an intake questionnaire and send it the moment the deposit clears
7. Build an asset and access checklist with formats, a single destination, and a due date
8. Stand up the shared workspace and orient the client before any work begins
9. Run a structured kickoff from an agenda and send a confirmed written recap
10. Schedule a 30-60-90 cadence and ask for a testimonial and referral at a high point