

## Client Welcome Pack



### This is how we'll stay in touch

Communication is key. We'll be in touch throughout the project to ensure you're happy with the progress and to address any questions or concerns you may have.

- Email
- Phone
- Video call

Let's get started



### Meet the Team

Our team consists of a mix of experienced professionals who are passionate about their work and committed to delivering the best results for our clients.

Our team includes a mix of professionals with a range of skills and experience, ensuring we have the right people in place to deliver the best results for our clients.

Our team is made up of a mix of experienced professionals who are passionate about their work and committed to delivering the best results for our clients.

Made in  
*Canva*

# Client Welcome Pack Template

CLIENT ONBOARDING  
FOR SERVICE BASED  
BUSINESSES

## Welcome

Thank you for choosing us. We're excited to have you on board and to start working together on your project. We'll be in touch throughout the project to ensure you're happy with the progress and to address any questions or concerns you may have.

Our team consists of a mix of experienced professionals who are passionate about their work and committed to delivering the best results for our clients. Our team includes a mix of professionals with a range of skills and experience, ensuring we have the right people in place to deliver the best results for our clients.

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*Your name*



## Getting Started: Checklist

- ☐ Complete the onboarding form and return it to us.
- ☐ Provide us with a copy of your business plan and financial statements.
- ☐ Provide us with a copy of your company's social media accounts.
- ☐ Provide us with a copy of your company's website.
- ☐ Provide us with a copy of your company's email accounts.
- ☐ Provide us with a copy of your company's phone records.

Let's get started

## What we need from you...

Our team needs to have access to your business plan and financial statements. We'll be in touch throughout the project to ensure you're happy with the progress and to address any questions or concerns you may have.

Our team needs to have access to your company's social media accounts. We'll be in touch throughout the project to ensure you're happy with the progress and to address any questions or concerns you may have.

Our team needs to have access to your company's website. We'll be in touch throughout the project to ensure you're happy with the progress and to address any questions or concerns you may have.

Let's get started

## Project Timeline

- Week 1**  
Initial setup and onboarding. We'll be in touch throughout the project to ensure you're happy with the progress and to address any questions or concerns you may have.
- Week 2**  
Initial setup and onboarding. We'll be in touch throughout the project to ensure you're happy with the progress and to address any questions or concerns you may have.
- Week 3**  
Initial setup and onboarding. We'll be in touch throughout the project to ensure you're happy with the progress and to address any questions or concerns you may have.
- Week 4**  
Initial setup and onboarding. We'll be in touch throughout the project to ensure you're happy with the progress and to address any questions or concerns you may have.
- Week 5**  
Initial setup and onboarding. We'll be in touch throughout the project to ensure you're happy with the progress and to address any questions or concerns you may have.

## Upgrade Package



Our team needs to have access to your business plan and financial statements. We'll be in touch throughout the project to ensure you're happy with the progress and to address any questions or concerns you may have.

- Complete the onboarding form and return it to us.
- Provide us with a copy of your business plan and financial statements.
- Provide us with a copy of your company's social media accounts.
- Provide us with a copy of your company's website.

## Invoice

Invoice #123456789  
Invoice date: 1st January 2024  
Invoice period: 1st January 2024 - 31st January 2024

Item	Amount
Service fee	£100.00
Travel expenses	£50.00
Food expenses	£20.00
Accommodation	£30.00
Transport	£10.00

Total: £210.00  
VAT (20%): £42.00  
Grand total: £252.00  
Payment details: Bank of England, Account No. 123456789, Sort Code 12-34-56

Thank you

# Sample Welcome Packet For New Customer

**Thirumalaisamy P.**  
**Velavancorresponding**



## **Sample Welcome Packet For New Customer:**

## The Enigmatic Realm of **Sample Welcome Packet For New Customer**: Unleashing the Language is Inner Magic

In a fast-paced digital era where connections and knowledge intertwine, the enigmatic realm of language reveals its inherent magic. Its capacity to stir emotions, ignite contemplation, and catalyze profound transformations is nothing lacking extraordinary. Within the captivating pages of **Sample Welcome Packet For New Customer** a literary masterpiece penned with a renowned author, readers attempt a transformative journey, unlocking the secrets and untapped potential embedded within each word. In this evaluation, we shall explore the book's core themes, assess its distinct writing style, and delve into its lasting effect on the hearts and minds of those that partake in its reading experience.

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