

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 expertise, ensuring we can handle any project you throw at us.

Our team is dedicated to providing you with the highest quality service and support throughout the entire project.

Welcome

Thank you for choosing us. We're excited to work with you and to help you achieve your goals. We'll be in touch soon to get started.

We'll be in touch soon to get started. We'll be in touch soon to get started. We'll be in touch soon to get started.

We'll be in touch soon to get started. We'll be in touch soon to get started. We'll be in touch soon to get started.

We'll be in touch soon to get started. We'll be in touch soon to get started. We'll be in touch soon to get started.

Your name



Getting Started: Checklist

- ☐ Complete the onboarding form and return it to us.
- ☐ Provide us with access to the systems we need to integrate with.
- ☐ Provide us with a list of your key contacts and their roles.
- ☐ Provide us with a list of your key projects and their deadlines.
- ☐ Provide us with a list of your key documents and their locations.
- ☐ Provide us with a list of your key reports and their formats.

Let's get started

What we need from you...

Information and data

Information and data

Information and data

Let's get started

Project Timeline

- Week 1**
Initial setup and onboarding. We'll be in touch to get started.
- Week 2**
Initial setup and onboarding. We'll be in touch to get started.
- Week 3**
Initial setup and onboarding. We'll be in touch to get started.
- Week 4**
Initial setup and onboarding. We'll be in touch to get started.
- Week 5**
Initial setup and onboarding. We'll be in touch to get started.

Upgrade Package



Upgrade your package to get the most out of our services. We'll be in touch to get started.

- Access to all our services
- Access to all our services
- Access to all our services
- Access to all our services

Invoice

Invoice #	Invoice Date
123456789	15/01/2023
Client Name	Client Address
ABC Company	123 Main St, London, UK
Invoice Total	Payment Due
£1,234.56	£1,234.56

Thank you for your payment. We'll be in touch to get started.

Let's get started

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Canva

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CLIENT ONBOARDING
FOR SERVICE BASED
BUSINESSES

Sample Welcome Packet For New Customer

Scott C. Dulebohn



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