

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 our services. We're excited to have you on board and to start working together to achieve your goals.

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.

We're excited to have you on board and to start working together to achieve your goals.

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.

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 articles of association and memorandum of association.
- ☐ Provide us with a copy of your company's tax records.
- ☐ Provide us with a copy of your company's bank statements.
- ☐ Provide us with a copy of your company's insurance policy.

Let's get started

What we need from you...

Our team needs to have a clear understanding of your business and your goals. We need to know what you want to achieve and what you need from our services.

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Let's get started

Project Timeline

- Week 1**
Initial consultation and onboarding.
- Week 2**
Initial consultation and onboarding.
- Week 3**
Initial consultation and onboarding.
- Week 4**
Initial consultation and onboarding.
- Week 5**
Initial consultation and onboarding.

Upgrade Package



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.

- Email
- Phone
- Video call
- Chat
- Social media
- In-person

Invoice

Invoice #	Invoice Date
123456789	15/01/2023
Client Name	Client Address
ABC Company Ltd	123 Main St, London, UK
Invoice To	Invoice From
ABC Company Ltd	XYZ Services Ltd
Invoice Amount	Invoice Due Date
£1,000.00	30/01/2023

Thank you

Sample Welcome Packet For New Customer

T. M. Sell



Sample Welcome Packet For New Customer:

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