

# Client Onboarding Kit

Marketing & Advertising

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

## Background

Produces a client onboarding kit — kickoff agenda, information/access checklist, roles, communication norms and first-30-day plan — so engagements start right. Use it when a client signs. For the discovery before that use the Client Discovery Questionnaire.

## Purpose of this tool & output

Start new clients smoothly and set expectations

## How the output is used

Use it to start new clients smoothly and set expectations — a client onboarding kit that avoids early misalignment.

## Important cautions

Collect access securely and follow least-privilege access practices.

## Companion documents

- Client Account Growth Plan
- Quarterly Business Review Deck
- Client Update / Status Email
- Upsell / Cross-sell Plan
- Client Feedback / NPS Survey
- Client Churn-Prevention Plan

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