Client Onboarding Checklist

Japhette Alec Pulido | GoHighLevel, Social Media, and Executive Assistant Support

Client _____ **Start date** _____ **Main contact** _____

1. Before we start

- [ ] Intro call done and notes saved
- [ ] Scope and price agreed in writing
- [ ] Service agreement signed
- [ ] First invoice sent and payment method confirmed

2. Access I need

- [ ] GoHighLevel or CRM login (or a new account set up)
- [ ] Calendar and email access (delegate or shared)
- [ ] Social media accounts and a scheduling tool
- [ ] Shared drive and brand files (logos, colors, photos)
- [ ] Customer or member list, if needed, with permission

3. What I need to know

- [ ] Top 3 goals for the next 90 days
- [ ] Who your customers are and where leads come from
- [ ] How leads, bookings, and follow-up work today
- [ ] Offers, prices, and anything I should never say
- [ ] Key contacts and who approves what

4. How we will work

- [ ] Main channel: email / Slack / WhatsApp
- [ ] Weekly check-in day and time (Pacific or Mountain)
- [ ] Weekly report day and format
- [ ] Urgent issues: how to reach me, and what counts as urgent

5. First two weeks

- [ ] Days 1 to 3: access checked and a quick audit of what exists
- [ ] Days 4 to 10: first fixes built and tested
- [ ] Day 14: review call on results and next steps

Notes

loomwellops@gmail.com | calendly.com/loomwellops/30min | loomwell-ops.github.io