Client Onboarding Checklist for Web Designers

Client Name: _____

1. Pre-Onboarding

[ ] Branded inquiry form or client onboarding form: Ask smart questions like 'Do you have product photos?' or 'Do you need payment integration?'.

[ ] Pre-written email templates: Have a welcome email ready with portfolio links.

[ ] Project management tool setup: Use Trello or Notion to auto-generate tasks when forms are submitted.

[ ] Portfolio or mockup showcase: Prepare examples tailored to retail or eCommerce.

2. Initial Consultation and Discovery

[ ] Conduct a discovery call or send an intake form: Ask about site goals, target customers, and pain points.

[ ] Discuss competitors and desired features: Collect examples of preferred or disliked sites.

[ ] Clarify success metrics and timeline: Confirm launch expectations and 3-month goals.

3. Contract and Payment

[ ] Send a proposal and contract: Define scope, features, revision rounds, and exclusions.

[ ] Define payment terms clearly: Break down by milestones and due dates.

[ ] Use reliable tools: Use Dropbox for contracts, Stripe or Wise for payments.

4. Collect Assets

[ ] High-resolution logo and brand colors: Request vector files and style guides.

[ ] Product photos with details: Ask for high-quality images with names, sizes, and prices.

[ ] Written content for key pages: Get homepage, About, and product descriptions.

[ ] Hosting, domain, or CMS access: Collect login credentials early.

5. Set Expectations and Timeline

[ ] Share an onboarding document: Explain your process and communication flow.

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[ ] Set communication preferences: Define tools (email, Zoom, Slack) and frequency.

[ ] Confirm key delivery dates: Set deadlines for drafts, revisions, and launch.

[ ] Define feedback and revision limits: Clarify rounds of revisions and how to give feedback.

6. Project Planning

[ ] Create a sitemap or page list: List pages like Home, Shop, About, Contact, and Size Guide.

[ ] Sketch basic wireframes: Plan layout flow for each page starting from the homepage.

[ ] Choose your tech stack: Decide between WordPress, Shopify, or other CMS.

[ ] Build a timeline with key dates: Schedule for drafts, feedback, and go-live.

7. Kickoff: Make It Official

[ ] Send a kickoff email or video message: Recap and confirm next steps.

[ ] Share the project timeline: Use Trello, ClickUp, or Notion and share access.

[ ] Explain the feedback process: Define how and when to give feedback.

[ ] Add a personal touch: Include a short line like 'Excited to build your store!'.