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New Client Onboarding Checklist:
The First 90-Days

Before the First Meeting

- Create **new client welcome emails.**
- Send a **meeting reminder email** with key details and what to expect (e.g., first meeting checklist).
- Send a **meeting reminder text.**
- Record **onboarding videos.**
- Create and send a custom **welcome email** (add “what to expect” video).
- Update the **FAQ page** on your website.
- Prepare a **welcome kit** with key collateral (e.g., intro letter, team contacts, process overview, access instructions, and required documents).
- Prepare a **welcome gift.**
- Send a **social media connection request** (on approved platforms: LinkedIn, Facebook, Instagram).
- Update your **CRM.** Assign new clients to relevant groups (e.g., client tier, investing stage, niche segment). Enter any known key data points: birthday, spouse/partner, mailing address, referral source.

During the First Meeting

- Deliver the **welcome kit.**
- Deliver the **welcome gift.**
- Provide an **office tour** or a virtual welcome.
- Take **detailed notes** on goals, communication preferences, personal details, and key milestones.
- Review your **client experience** - process and set expectations.
- Share and have your client complete a **new client survey.**
- Schedule the **next meeting** before ending the appointment.

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After the First Meeting

- ○ Update **CRM** with survey results, meeting notes, preferences, and key details.
- ○ Send a **thank you card.**
- ○ Send a meeting **follow-up email** (add a meeting recap with clear next steps).
- ○ Launch your **onboarding communications.**
  - FAQ email
  - New client e-newsletter
  - High-Value content ((e.g., eBook, checklist, video)
- ○ Surprise and delight with **greeting cards.** Schedule in advance to arrive on a future date.
- ○ Update **marketing email automation** groups as needed to add the client to key emails.
- ○ Send a **quick check-in** (text or email).
- ○ Send a **client event email invitation.**
- ○ Share the **Client Satisfaction Survey** at least 90 days after onboarding, or in your next in-person meeting.
- ○ If permitted, request a **review or testimonial.**

Plug Into Tools that Streamline Your Client Onboarding

See how FMG can help you automate these strategies and turn every new client into a raving fan. Book your free 20-minute consultation today.

Book a Consult