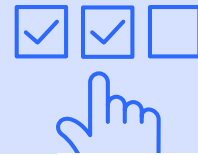




New Client Onboarding Checklist: The First 90-Days



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.



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](#)