

Client onboarding checklist

A fictional record of material to discuss

This sample shows how an initial conversation could organise the material a business already holds. The exact requirements and a suitable way to share information would be agreed for an actual engagement.

Clarify the request

In this fictional example, a business wants a clearer overview of its records before discussing support. The first step is to describe the requested help and confirm who can authorise the work.

Example material register

Category	Sample position	Question for the discussion
Business overview	A short description is available.	What background would help explain the request?
Existing records	Documents are held in several places.	Which categories are relevant to the agreed scope?
Open questions	Some items need clarification.	What should be resolved before work is defined?
Sharing arrangement	No documents have been submitted.	What secure route and access are appropriate?

Before anything is shared

Agree the scope, the person responsible for supplying material and how it will be handled. Keep passwords, banking credentials and unrelated personal information out of an initial message.

Sample status Requirements and engagement still to be agreed

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