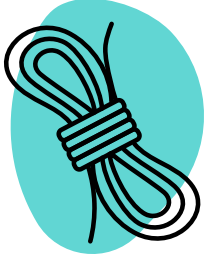




ONBOARDING + OFFBOARDING: PARAMETERS FOR SUCCESS



What does everyone need to succeed in working together?

Use the questions and space provided to determine what everyone needs to succeed in working together. Take your time and get into the shoes of who you are thinking about.

YOUR CLIENTS

Do they need a roadmap?

Do they need to send over information?

Do they need to send over assets?

What do they need to feel supported?

YOUR BUSINESS

What information do you need?

What assets do you need?

What processes do you need?

Do you want to include a gift?

How do you keep from making this experience robotic?

What do you need to feel supported?

Pro Tip

Your client onboarding sets the tone. First impressions are important and when done right it creates trust and confidence in your clients.

