

Consultant Client Onboarding Checklist

Before Initial Meeting

- Receive Request / Opportunity
- Analyze Project Scope
- Draft Initial Proposal
- Determine Budget Estimate
- Assemble Project Team Members
- Send Proposal for Internal Review
- Send Proposal for Client Review
- Get Approval and Set Meeting Date

First Meeting

- Review Proposal in Person
- Source All Questions and Concerns
- Get Approval to Move Forward

After the First Meeting

- Prepare Formal Contract
- Send Contract for Internal Review
- Send Contract for Client Review

Onboarding

- Send Welcome Email
- Send Pre-Project Questionnaire
- Schedule Initial Consultation
- Secure the Following Information
 - Total and Annual Revenue
 - Total Overhead
 - Historical CAC Numbers
 - P&L Statements

Planning

- Determine Dominant Problems
- Set Project Goals
- Draft Initial Solution Action Plan
- Review Client's Financial State

Executing

- Conduct SWOT Analysis
- Conduct a Porter's Five Forces Analysis
- Conduct Competitor Analysis
- Determine High-Level Strategic Approach
- Set Timeline and Deliverables
- Finalize Client Action Plan

Final Approvals

- Send Action Plan and Timeline for Internal Approval
- Share Final Plan Document with Clients
- Present Plan and Timeline to Clients
- Source Client Feedback
- Incorporate Appropriate Changes
- Set Meeting Cadence and Dates
- Establish Progress Report Cadence
- Get to Work!