

— FOR AGENCY OWNERS AND PROJECT LEADS

The client **onboarding kit.**

Everything that happens between the signature and the first deliverable: the welcome email, the questions, the access, the kickoff and the first week, ready to adapt.

TIME

One afternoon to adapt

FOR

Owners, project and account leads

EDITION

October 2026

— HOW TO USE IT

The first two weeks set the tone.

A client who has just signed is at their most enthusiastic and their most anxious. If the next message takes days, or asks the same questions as the sales call, the doubt starts. If it arrives the same day with a clear plan, the project starts on trust.

This kit gives you the pieces of a repeatable onboarding: a welcome email, the questions to ask per service, an access checklist that keeps passwords out of email, a kickoff agenda, a first-week plan and a short “how we work” page. Adapt each piece once, then use it for every client.

Step 1	Read sections 1 to 3 and rewrite the templates and questions in your own words, for your own services.
Step 2	Adapt the kickoff agenda, the first-week plan and the “how we work” page in sections 4 to 6.
Step 3	Section 7 and the table at the end: decide who owns onboarding and test it on your next signed client.

01 The welcome email

Send it on the day the client signs. It thanks them, tells them what happens next and asks for one thing only.

Welcome email, sent on the day of signature

Hello [first name],

Thank you for choosing [agency] for [project]. We're glad to start.

Here is what happens next:

- Today: you receive a short onboarding form. It takes about [time] and replaces the long email thread.
- By [date]: we ask you to share access to [accounts], following the attached checklist. Please don't send passwords by email.
- On [date]: our kickoff call, [length], with [names and roles].
- By [date]: you see the first milestone, [milestone].

Your contact for the whole project is [name, role]. You can reach us at [channel], and we reply within [reply time] on business days.

[Your name]

☐ The welcome email goes out on the day of signature, from the person who will run the project.

☐ It asks for one action only: the onboarding form.
Everything else comes later, in the right order.

☐ The first invoice, if due at signature, is sent separately and on the same day.
Mixing the welcome and the invoice makes both feel colder.

02 Onboarding questions per service

Ask once, in one form, everything the team needs to start. Never ask again what the client already told sales.

For every project

- Who decides, who is consulted, and who signs off each milestone?
- What does success look like for you in six months? How will we measure it together?
- Any fixed dates: a launch, an event, a season?
- Best channel and times to reach you; any dates you are unavailable

Website project

- The one action you want visitors to take: call, WhatsApp, book, request a quote
- Pages you need, and who writes the texts
- Logo files, brand colours and fonts, photos you own the rights to
- Domain name and who holds it; current hosting, if any
- Three sites you like, and why; three competitors

Brand project

- What the business does, for whom, in two sentences
- Three words you want people to use about you, and three you don't
- Where the brand will appear first: signage, website, social, print
- What must stay from the current identity, and what can go

App or software project

- The one job of the first version, in one sentence
- Types of users and what each one comes to do
- Existing data, documents or tools it replaces or connects to
- Who runs the product after launch, and who owns the accounts

Search, ads or monthly growth work

- Services and areas that matter most to the business
- Access to Search Console, analytics, ad accounts and the business profile
- What was tried before, and what you saw
- The budget you set for ads, kept separate from our fee

Your services: the one question only your agency would ask.

The question that shows the client you know their work.

03

Access, without passwords in email

Access is where onboarding stalls most often, and where security is easiest to get wrong.

- ☐ Every account is created in the client's name, with the client's email: domain, hosting, Google, analytics, ad accounts, social pages, app stores.
The client owns the account; the agency is invited into it.
- ☐ Where a service allows it, the agency is invited as a user with its own login.
Invitations can be removed at the end without changing anything for the client.
- ☐ When a password must be shared, it goes through a password manager, never by email, chat or text message.
- ☐ We keep a written list of every access we hold for each client, and who on our side uses it.
- ☐ We ask the client to turn on two-step sign-in on the main accounts.
- ☐ At the end of the project, we remove our access or confirm in writing what we keep for support.

04

The kickoff call

One hour, with a fixed agenda. It ends with dates both sides agree on, not with "we'll be in touch".

Kickoff agenda, about 60 minutes

1. Introductions: who is who, who decides, who to contact (5 min)
2. Goals: what success looks like and how we will measure it together (10 min)
3. Scope: what is included, what is not, how changes are handled (10 min)
4. Milestones and dates, and what we need from you before each one (15 min)
5. How we work: channel, reply times, approvals and revision rounds (10 min)
6. Open questions and next steps, with names and dates (10 min)

- ☐ The onboarding form is answered before the kickoff, so the call is spent on decisions, not on collecting information.
- ☐ Someone on our side writes the recap and sends it within one business day.
Decisions, dates, open questions, who does what.
- ☐ The client's decision maker attends the kickoff.
If they can't, move the call; don't start without them.

05

The first week

The first week should show visible progress. The client should never wonder whether work has started.

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- ☐ Day 1: welcome email sent, onboarding form open, project created with its milestones and dates.
 - ☐ Day 2: form answers read by the project lead; missing items listed and asked for in one message.
 - ☐ Day 3: kickoff call held; recap with decisions and dates sent.
 - ☐ Day 4: access checked: every account on the list works, without any password sent by email.
 - ☐ Day 5: first written update to the client: what was done, what comes next, what we are waiting for.
A short update on the last working day of every week replaces most status calls.
 - ☐ The client knows where to see the project status without asking.
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06

“How we work”, on one page

Give every client the same short page. It answers the questions that otherwise arrive one by one, at awkward moments.

How we work with you

- Where we talk: [channel]. Your contact is [name].
- When we reply: within [reply time], [days and hours]. Urgent problems: [how to flag them].
- Updates: a short written update every [day].
- Approvals: each milestone ends with your written approval. [Number] revision rounds are included per stage; a round is one list of comments.
- Changes: anything outside the scope is written down and quoted before we start it.
- Invoices: they follow the schedule in your proposal, sent to [email].
- After launch: [support plan, reply time, how to ask for help].

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- ☐ Every client receives this page before the kickoff, and it matches what the proposal says.
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07

Your onboarding, written down

A process that lives in one person's head stops when that person is on holiday.

Who owns onboarding for each new client?

One named person, from signature to the end of week one.

What triggers it: the signature, the first payment, or both?

Where do the form answers, files and access list live, so the whole team finds them?

What do you still ask clients by email that should be in the form?

Look at the last three projects: every follow-up question is a missing form field.

☐

We used this kit on our last new client and wrote down what to improve.

Your three onboarding fixes

WHAT TO CHANGE	OWNER	DATE
1		
2		
3		



— SEE IT RUNNING

Want onboarding that **runs the same every time?**

Qafza OS is the system we run our own agency on. A signed proposal opens the project with its milestones, sends an onboarding form for the service, shows the client their team and the kickoff booking, and keeps access and handover without passwords. Book a 30-minute demo: we show it with sample data and look at how you onboard clients today.

- Onboarding forms per service, sent when the client signs
- A welcome page with the team, the first week and the kickoff booking
- Milestones, written approvals with revision rounds, weekly updates
- Handover of accounts, files and videos, without passwords

Book a demo

qafza.dev/en/os



Qafza designs and builds brands, websites and software, and offers agencies and service teams Qafza OS, the system it runs its own agency on, under their own brand.