

Client Onboarding Kit — Preview

Intake form, kickoff agenda, welcome email pack, and meeting/action tracker in one ZIP.

PREVIEW ONLY — this PDF is a sample overview, not the complete editable template.

What this product helps with

Move new clients from yes to organized kickoff without rebuilding the process every time.

Included in the paid ZIP

File	Type	Availability
Client Intake Form	DOCX	Included in paid download
Client Kickoff Agenda	DOCX	Included in paid download
Client Welcome Email Pack	DOCX	Included in paid download
Meeting Notes Action Tracker	DOCX	Included in paid download

Sample excerpt

The paid download contains the full editable DOCX/XLSX files. This preview shows representative structure only; operational fields are abbreviated or redacted.

Area	Example content	Preview status
Sample section	Representative prompt	PREVIEW ONLY
Owner / role	[field shown in paid template]	Redacted
Decision / action	[editable working area in paid template]	Redacted
Follow-up / notes	[additional rows included in paid template]	Redacted

To use the template, purchase the product and download the editable ZIP after Stripe checkout verifies payment.