BUSINESS ADVISORY LAUNCH PROGRAMME · ONBOARD THE CLIENT

Client onboarding pack

The signed-to-started sequence that protects you before any work begins.

01 Before any work

- [ ] Engagement letter signed (Module 4), and an NDA if the client needs one.
- [ ] Scope confirmed in writing, including what is out of scope.
- [ ] The refer-out boundary set: you refer regulated matters to a qualified professional.

02 Kickoff

- [ ] Outcome, timeline, and points of contact agreed.
- [ ] Client data collected securely, taking only what the work needs.
- [ ] Expectations set on how and how often you will communicate.

PREFER THIS DONE FOR YOU?

Want onboarding built into a client portal?

It's one of the things we build — hand it over and skip the DIY. · digitalroyalty.co.uk

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