

AGENCY OPERATIONS TEMPLATE

Client Onboarding Pack

Everything the first thirty days needs: the welcome pack, the intake questionnaire, the access checklist, and the kickoff agenda.

The first month sets the tone for the whole engagement. Clients who feel organised in week one forgive a lot later; clients who chase you for a start date never quite trust the process again. This pack is four documents in one, in the order you actually use them.

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How to use this pack

Onboarding is the only part of an engagement that every client experiences identically. Systemise it once and it stops consuming your best hours.

- 1 **Send the welcome letter within 24 hours of signature.** The gap between 'yes' and 'what happens now' is where buyer's remorse lives.
- 2 **Send the questionnaire and the access checklist together.** Two separate requests means two separate delays.
- 3 **Do not schedule kickoff until the access checklist is complete.** A kickoff call where nobody can log in is a status meeting about logins.
- 4 **Fill the roles table before the call, not during it.** Discovering there are three approvers on the call itself is how projects lose their first two weeks.
- 5 **Book the 30-day check-in during kickoff.** Nobody books it later.

THE NUMBER THAT MATTERS

Measure days from signature to kickoff. If it is longer than ten business days, the bottleneck is almost always the access checklist, not the client's enthusiasm. Make it easier to complete rather than asking more often.

The onboarding timeline

WHEN	WHAT HAPPENS	WHO OWNS IT	DONE
Day 0	Contract signed, deposit invoice issued		
Day 1	Welcome letter sent with questionnaire and access checklist		
Day 1	Client added to project tool and shared channel		
Day 3	Deposit cleared, internal project set up		
Day 5	Questionnaire returned, access confirmed working		
Day 7	Kickoff call held		
Day 8	Kickoff notes and agreed plan circulated		
Day 14	First deliverable or first progress update		
Day 30	Check-in call, expectations recalibrated		

EVERY ROW NEEDS A NAME

Unowned steps are the ones that slip. If a row has no owner, it belongs to whoever is least busy, which means nobody.

Welcome letter

Send this within a day of signature. It answers the three questions every new client has and does not ask: what happens now, who do I talk to, and what do you need from me.

TEMPLATE COPY

Hi name ,

Welcome aboard, and thank you for choosing us. Here is exactly what happens over the next week so nothing catches you by surprise.

What happens now. I have attached two short documents: a questionnaire about your business and goals, and a checklist of the access we need. Both should take under 30 minutes. Once they are back with us, we will book your kickoff call.

Who you will work with. Name is your day-to-day contact and the fastest way to reach us is channel . For anything urgent, escalation contact .

What we need from you. The two attachments by date , and one named person who can approve work on your side. That last one matters more than it sounds.

Any questions before then, just reply to this email.

Attach to this email

- | | |
|--|--|
| ☐ Intake questionnaire | ☐ Access and assets checklist |
| ☐ Signed contract copy | ☐ Deposit invoice |
| ☐ Project tool invitation | ☐ Calendar link for kickoff |

Intake questionnaire

Keep it short enough to finish in one sitting. A 40-question form gets abandoned; a 12-question form gets answered properly.

Business context

WHAT DOES THE BUSINESS DO

In one sentence, as you would say it aloud

WHO IS THE IDEAL CUSTOMER

WHAT ARE YOU KNOWN FOR

WHO DO YOU LOSE DEALS TO

This project

WHAT MADE YOU START LOOKING NOW

The trigger, not the requirement

WHAT DOES SUCCESS LOOK LIKE IN 6 MONTHS

WHAT HAS BEEN TRIED ALREADY

And why it did not work

WHAT MUST NOT CHANGE

Practicalities

HARD DEADLINES

Events, launches, seasonality

WHO SIGNS OFF

PREFERRED CONTACT CHANNEL

THE MOST USEFUL QUESTION ON THE PAGE

'What made you start looking now.' The answer tells you the real deadline, the internal politics, and what they will actually judge you on. It is rarely the same as the brief.

Access and assets checklist

Ask for everything at once, with a note on why each item is needed. Piecemeal requests are the single biggest cause of a slow start.

Technical access

WHAT	WHY WE NEED IT	RECEIVED	WORKING
WordPress admin account	To build and configure		
Hosting control panel	Deployments, backups, PHP settings		
Domain registrar	DNS changes at launch		
Google Analytics	Baseline measurement		
Google Search Console	Indexing and search data		
Email or CRM platform	Form and lead routing		
Payment gateway	Only if ecommerce is in scope		

Brand and content assets

- ☐ Logo files, vector where possible
- ☐ Brand guidelines or colour and font specs
- ☐ Product or team photography
- ☐ Existing copy for pages in scope
- ☐ Testimonials and case studies with permission to use
- ☐ Legal pages: privacy, terms, cookie policy

NEVER ACCEPT CREDENTIALS BY EMAIL

Ask for a named account created for you rather than a shared password, and use [password manager](#) for anything that must be sent. Shared logins make it impossible to audit who changed what, and they outlive the engagement.

Kickoff meeting agenda

DATE AND TIME	DURATION	ATTENDEES
	60 minutes	

MIN	ITEM	OUTCOME REQUIRED
5	Introductions and roles	Everyone knows who decides what
10	Confirm goals and success measures	Agreed written definition of done
10	Walk the scope and the exclusions	No surprises later about what is not included
10	Timeline and dependencies	Client knows their dates, not just yours
10	Communication and reporting	Channel, cadence, and response times agreed
10	Risks and open questions	Named owner for each unknown
5	Next steps and 30-day check-in booked	Calendar invite sent before the call ends

END EVERY KICKOFF THE SAME WAY

Ask: what would make you feel, in thirty days, that this was going well? Write the answer down verbatim and read it back at the check-in. It is the only success measure the client will actually remember.

Roles and escalation

Who does what

ROLE	NAME	ORGANISATION	CONTACT	DECIDES ON
Day-to-day contact				
Approver				
Technical contact				
Billing contact				
Escalation				

Communication rules

PRIMARY CHANNEL

RESPONSE TIME COMMITMENT

One channel. Not email and Slack and WhatsApp

REPORTING CADENCE

STANDING MEETING SLOT

ONE APPROVER, IN WRITING

The single most expensive onboarding failure is discovering in week four that feedback has to pass through someone who was never on the call. Name them now, or confirm in writing that there is nobody else.

The 30-day check-in

Booked at kickoff, held on time, run in twenty minutes. This is where you catch dissatisfaction while it is still a small correction.

Ask these five questions

- 1 Is this going the way you expected? If not, where did it diverge?
- 2 Is the communication working, or would you rather hear from us more or less often?
- 3 Has anything changed on your side that we should know about?
- 4 Reading back your answer from kickoff: does this still describe what good looks like?
- 5 What is the one thing you would change about how we are working?

Internal review, same day

- ☐ Actual hours against estimate. Flag anything above 110 percent now, not at invoice time
- ☐ Scope creep logged, priced, and either absorbed deliberately or raised
- ☐ Every access item still working, nothing expired
- ☐ Client has received something tangible, not just updates
- ☐ Next 30 days planned and communicated

IF THE ANSWERS ARE LUKEWARM

A client who says 'fine, I think' at day thirty is not fine. Ask the fifth question again, and wait through the silence. The real answer usually arrives second.

We build the systems behind the paperwork

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2014 Founded	850+ Clients served	2,000+ Projects completed	10,000+ Plugin installs
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What we do

WordPress engineering

Custom themes, blocks, plugins, and migrations built to stay fast and maintainable after handoff.

SEO strategy

Technical fixes, topical coverage, and search visibility work measured against clicks, not scores.

Content marketing

Research-led articles and editorial systems your team can keep publishing without us.

Conversion design

Landing pages, service pages, and forms designed around the decision the reader is actually making.

Need this handled instead of templated?

Send the problem, not a brief. We will tell you whether it is worth building, what it depends on, and what we would deliberately skip. If the honest answer is that you do not need us, you will get that too.

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