## **Welcome**

* Send onboarding documents
* Send client intake info form

## **Legal**

* Send or sign the NDA
* Send or sign the contract
* Save copies to your client/project manager

## **Finance**

* Send a W-9
* Add client to your accounting/invoice software
* Log agreed-upon rates
* Sign up for the client's accounting software
* Send initial invoice

## **Communication**

* Confirm contact details for the correct points of contact in your client’s organization
* Join the client's team chat/add them to yours
* Set up client labels in your inbox
* Schedule a kickoff call
* Provide self-serve resources

## **Project management**

* Add client and project to your time tracker
* Add client to your project management app
* Create initial to-dos
* Assign tasks and add any known due dates

## **File sharing**

* Create a client folder in your file-sharing software
* Add the client to a shared folder to see deliverables