Client onboarding checklist

Use this template to create a smooth onboarding process for your accounting practice. If you offer multiple services, duplicate this document and adjust it for each type of client (e.g., tax client, sole-traders, not-for-profits, etc.)

Get the contract signed

The contract stage includes agreeing on your proposal and having your new client sign an engagement letter. Make sure all payment terms and the scope of what will be delivered is clear and on the record.

Gather information

Arrange a meeting to gather all the information you'll need to start working. This includes:

- Basic business details, including registered name and addresses.
- All contact details.
- Any legal forms or documents relevant to the country you operate in.
- Relevant system passwords.
- Past financial records, including invoices, account reconciliations, tax returns, and year-end statements.
- Copies of any paper records.
- Most recent financial statements.

Get access to accounts

Ask the client for access to their online banking, credit cards, and loan accounts.

Set up accounting software

Get access to the client's accounting software. If the system is one your firm doesn't use, get them set up on your preferred software and schedule an intro session.

Hold kick-off meeting

Arrange a meeting to introduce your team to the client. Set expectations around deliverables and provide any training the client might need.

Internal housekeeping

Add the client's details to your project-management software, and their passwords to any password app you use. You may also want to follow them on social media and add their email to your newsletter list.

Schedule billing and payment

If relevant, schedule recurring billing in your finance system and set up automated invoice reminders.

Follow up

Have a call 30 days after your kick-off meeting to follow up on any outstanding information. Encourage them to ask any questions and let them know what the next steps will be. It's a good idea to turn this into a regular follow up.

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