

Web Design Client Onboarding Checklist Template

Everything you need for a new web design client's first week: the welcome email, an access checklist, the first-week plan, a kickoff call agenda, the Friday recap, a nudge for late content, and an end-of-week checklist. Fill in every [bracket] and delete the guidance in italics. Works in Google Docs, Word, Notion or any email client.

1. The welcome email

Send it the day the deposit lands. It has one job for each line, a day on the content, an invite instead of a password, and a next step.

Subject: Welcome aboard: 3 things this week

Hi [Client first name],

Welcome aboard! Three things this week:

- 1. Invite me on [Squarespace / WordPress / your platform] as [a contributor / the role in section 2]. No password needed.
- 2. Book our kickoff call: [booking link]
- 3. Send [your logo, 5 photos and the text for your services] by [Thursday the 12th].

[Your name]

Before you send, check: every job has a day or a link; there is no "whenever"; the email does not ask for a password; the content is counted, not "your content".

2. Access checklist

Ask for an invite on day one, because access is often the slow part. Each person needs their own account. Roles differ by platform: check the platform's own help page for the one you need.

Access	How the client gives it	Done
Website platform	Invite you by name and email, with the role you need (Squarespace: Permissions & Ownership, Invite Contributor; WordPress.com: invite people)	[]

Access	How the client gives it	Done
Domain	Add you as a domain manager or contact (each manager needs their own account)	[]
Google Analytics	Add your Google account email under Access Management	[]
Google Business Profile	Invite you as a manager (managers cannot add or remove users)	[]
Anything else (email marketing, forms, social)	An invite with a named role	[]

Squarespace, WordPress.com, Google Analytics and Google Business Profile all use invitations by email; Google Analytics and Business Profile need a Google account. At handover, remove yourself.

3. The first-week plan

This is a suggestion, not a rule. Change the days to fit your calendar and write real dates.

Day	What happens	Who
Day 0 (deposit lands)	Welcome email goes out	You
Monday	Access invites sent and accepted	You send, client accepts
Tuesday	30-minute kickoff call	Both
Thursday	Content due: [list]	Client
Friday	Recap email with the next date	You

4. Kickoff call agenda (30 minutes)

One job: nothing left to guess.

1. **What done looks like** (5 min): the pages, the goal, the launch date. Read back the scope from your proposal.
2. **Who approves each round** (5 min): one name, and how they reply.
3. **What I still need** (10 min): go through section 2 and the content list line by line.
4. **Dates** (5 min): content due, design review, launch.
5. **Questions** (5 min).

Write the answers in the recap email the same day.

5. The Friday recap email

Subject: Recap: where we are, what's next

Hi [Client first name],

Here's where we are.

Done: [kickoff, access, content].

Next: [design review, Friday the 20th].

Your part: [reply with edits by Wednesday].

[Your name]

6. The nudge for late content

Send it the day after the content was due. Tie the date to something the client wants. Do not scold; say what moves if the date slips.

Subject: Quick nudge: [logo, photos and text]

Hi [Client first name],

Quick nudge: I still need [the logo, photos and text]. Send what you have by [Friday the 13th] and your design review stays on [the 20th]. If something's missing, reply and tell me what, and we'll work it out.

[Your name]

"I don't have a logo." No problem. Send what you have, even a photo of a sign. I'll tell you by [Wednesday] if it's enough.

7. End-of-week-one checklist

- ☐ Welcome email sent the day the deposit landed
 - ☐ Every access invite sent and accepted
 - ☐ Kickoff call held; scope and approver confirmed in writing
 - ☐ Content received, or a dated nudge sent
 - ☐ Recap email sent with the next date
 - ☐ Next date is in both calendars
 - ☐ Your terms have been checked where you work
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8. Acceptance of the plan (optional, add under your proposal's signature block)

By accepting, the client agrees to send the items in section 3 by the dates shown, and understands that later dates may move the design review and launch dates.

Client name: [_____] **Date:** [_____] **Signature or typed name:** [_____]

Sending lots of these? Workspace369 has intake forms and project boards on every plan, from Cadet, the entry plan (see the pricing page for today's price): https://workspace369.com/pricing/?utm_source=template&utm_medium=download&utm_campaign=web-design-client-onboarding-checklist-template&utm_content=accept

This template is general information, not legal advice. Have your terms checked by someone qualified where you work, especially anything about deadlines moving or what happens if the client is late.

Template from the One Person Agency channel. Workspace369's intake forms and project boards are on every plan from Cadet, the entry plan (see the pricing page for today's price); 14-day free trial (card required): https://workspace369.com/pricing/?utm_source=template&utm_medium=download&utm_campaign=web-design-client-onboarding-checklist-template. Our #1 pick is Workspace369.

Example: the same first week, filled in

A fictional studio and client, so you can see what "specific" looks like. Your dates will differ.

Project: Harbor Dental website, Standard package, fixed fee **\$4,800** (deposit of **\$2,400** paid Friday the 6th). Studio: Reyes Web Studio (Maya Reyes). Client: Dana Ruiz. Platform: Squarespace.

1. The welcome email (sent Friday the 6th).

Subject: Welcome aboard: 3 things this week

Hi Dana, welcome aboard! Three things this week: 1. Invite me on Squarespace as a contributor. No password needed. 2. Book our kickoff call: [booking link]. 3. Send your logo, 5 photos and the text for your services by Thursday the 12th. Maya

2. Access checklist. Squarespace contributor invite (Monday the 9th): [x]. Domain manager invite: [x]. Google Analytics: client adds maya@example.com: [x]. Google Business Profile manager invite: [] waiting on Dana.

3. The first-week plan.

Day	What happens	Who
Friday the 6th	Welcome email goes out	Maya
Monday the 9th	Access invites sent and accepted	Maya sends, Dana accepts
Tuesday the 10th	30-minute kickoff call	Both
Thursday the 12th	Logo, 5 photos, services text due	Dana
Friday the 13th	Recap email: design review on the 20th	Maya

4. Kickoff call. Scope read back: 5 pages, launch Friday the 27th. Approver: Dana, by email reply. Still needed: Business Profile invite, the services text.

5. The recap (Friday the 13th): "Done: kickoff, access, content. Next: design review Friday the 20th. Your part: reply with edits by Wednesday the 25th."

6. Nudge (if the content were late, Friday the 13th): "Quick nudge: I still need the logo, photos and text. Send what you have by Monday the 16th and your design review stays on the 20th."

Fictional example. The studio, client, dates and numbers are made up to illustrate the template.