FREE CONSULTANT TEMPLATE

30-Day Client Onboarding Checklist

A simple, practical template to help consultants build trust, create momentum, and avoid confusion during the first month with a new client.

Use this when:	**Outcome:**
Starting a new client engagement, preparing kickoff, or organizing your first month of consulting work.	Clear expectations, visible progress, better follow-up, and a useful 30-day client readout.

30-Day Checklist

Work through the checklist week by week. Keep notes short, confirm decisions early, and make progress visible to the client.

Week 1 - Understand Before You Advise

Goal: Build trust and understand the real situation.

- ☐ Schedule the kickoff meeting.
- ☐ Ask what would make the engagement successful in 30, 60, and 90 days.
- ☐ Confirm the client goals, scope, and first priorities.
- ☐ Identify the stated problem and what has already been tried.
- ☐ Map the key stakeholders and decision makers.
- ☐ Learn the client language: repeated phrases, internal terms, and sensitive topics.
- ☐ Send a kickoff summary: what I heard, what we agreed, what happens next, and what I need.

Week 2 - Find the Real Problem

Goal: Separate symptoms from root causes.

- ☐ Review documents, reports, workflows, and current client notes.
- ☐ Speak with important stakeholders and listen for different versions of the same problem.
- ☐ Look for repeating issues and places where work gets stuck.
- ☐ Notice what people avoid saying directly.
- ☐ Check whether the original problem is still the right problem.
- ☐ Share early observations without over-promising.
- ☐ Send a weekly update: what happened, what we learned, and what happens next.

30-Day Checklist Continued

Week 3 - Create Useful Movement

Goal: Deliver a meaningful quick win.

- ☐ Identify one small but valuable improvement.
- ☐ Choose a quick win connected to the bigger goal.
- ☐ Avoid shallow wins that only look good but do not matter.
- ☐ Clarify ownership on open actions and decisions.
- ☐ Help the client make one delayed decision.
- ☐ Simplify one confusing process, report, workflow, or discussion.
- ☐ Confirm next steps with clear owners and dates.

Week 4 - Show Progress Clearly

Goal: Make the value of your work visible.

- ☐ Review what changed since day one.
- ☐ List key findings, decisions made, and early wins.
- ☐ Identify risks, blockers, and open questions.
- ☐ Ask whether the way of working is useful so far.
- ☐ Prepare the 30-day readout.
- ☐ Recommend the next steps and explain why.
- ☐ Agree on the next phase of work.

Simple habit: after every important conversation, capture what was heard, decided, changed, and needed next.

30-Day Readout Template

Use this page to prepare a short client update at the end of the first month. Keep it clear, practical, and connected to the next decision.

1. What we learned

2. What we clarified

3. What changed

4. What still needs attention

5. Recommended next steps

Client Notes and Follow-Up

Use this space during the first month to capture important names, promises, risks, reminders, and follow-up actions.

Important stakeholders	Decisions to confirm

Risks or blockers	Follow-up actions

Tip: Keep your client notes, reminders, follow-ups, and opportunities in one place. Bindin helps consultants stay organized without a complex CRM setup.

Best regards from the Bindin team