



5 Step Website Project Onboarding Checklist

Feel in control
of your projects
from start to finish


hello

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Follow these steps to put a system in place for quickly and efficiently onboarding new projects. Rid yourself of project overwhelm and take control of your client projects.

- ☐ Send contract
- ☐ Invoice deposit
- ☐ Add project in Project Management system
- ☐ Content organization process
- ☐ Welcome email
 - ☐ Welcome packet
 - ☐ Client questionnaire
 - ☐ Schedule Kickoff Call