EDITABLE PROJECT CHECKLIST

Client Onboarding and Project Setup Checklist

Capture the commercial, delivery, communication, access, billing, and time-recording decisions a service team needs before work begins.

Client	[Client name]	Project	[Project name]
Project owner	[Name / role]	Client lead	[Name / role]
Target start	[YYYY-MM-DD]	Version	[1.0]

How to use this checklist

Complete it with the client and internal project owner, assign every open decision, and keep the final version with the project records. Remove rows that do not apply and add any controls required by the contract or local rules.

1. Commercial and scope

Done	Checklist item	Owner	Due date / evidence
☐	Signed agreement or approved statement of work is stored with the project records.		
☐	Scope, deliverables, exclusions, acceptance criteria, milestones, and target dates are clear.		
☐	Pricing model, currency, rates, billing cycle, payment terms, purchase-order requirements, and tax responsibilities are confirmed.		
☐	Change-request owner, approval path, and effect on budget or dates are documented.		

2. People, communication, and decisions

Done	Checklist item	Owner	Due date / evidence
☐	Client sponsor, day-to-day contact, project owner, delivery lead, billing contact, and approvers are named.		
☐	Meeting cadence, status format, shared channels, response expectations, and escalation path are agreed.		
☐	Open decisions have an owner and due date; kickoff participants and agenda are confirmed.		

3. Delivery and project setup

Done	Checklist item	Owner	Due date / evidence
☐	Project code, client record, work breakdown, milestones, dependencies, risks, assumptions, and owners are created.		
☐	Approved hour and money budgets, staffing plan, rates, billable and non-billable rules, and budget alerts are recorded.		
☐	Definition of done, review steps, quality checks, handover, support, and closure expectations are clear.		

4. Time, approval, and invoicing flow

Done	Checklist item	Owner	Due date / evidence
☐	Who records time, required project and task detail, submission deadline, reviewer, approver, and correction path are agreed.		
☐	Overtime or out-of-scope work requires an identified approval before work whenever possible.		

☐	Invoice preparation uses approved timesheets, agreed rates, supported adjustments, and a named final reviewer.		

5. Access, data, privacy, and security

Done	Checklist item	Owner	Due date / evidence
☐	Required accounts, permissions, systems, repositories, shared folders, and environments have owners and due dates.		
☐	Data categories, permitted locations, confidentiality, retention, deletion, incident contacts, and offboarding steps are confirmed.		
☐	Least-privilege access and any client security or privacy requirements are reviewed before data is shared.		

6. Ready to start

Done	Checklist item	Owner	Due date / evidence
☐	Critical blockers are closed or accepted by the named decision-maker.		
☐	The team can access the required tools and understands the first deliverable, first deadline, and next checkpoint.		
☐	Client and project owners confirm that the setup is ready for work to begin.		

Open decisions and risks

Decision or risk	Owner	Due date	Status / resolution

Readiness confirmation

Project owner	
Client representative	
Ready-to-start date	
Remaining accepted exceptions	

Operational starting point only - not legal, tax, payroll, security, privacy, or contractual advice. Verify the requirements that apply to the engagement.