

TemplateForge Client Onboarding Kit - Free Sample

A TemplateForge launch resource for solo service businesses

Format: PDF workbook

Access: Permanent access to the downloadable PDF workbook.

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FREE SAMPLE

This sample shows the workbook structure without requiring an account or purchase.

SIX-PHASE CHECKLIST STRUCTURE

1. Contract - 5 tasks
2. Payment - 4 tasks
3. Access - 5 tasks
4. Kick-off - 5 tasks
5. Project setup - 5 tasks
6. Handoff - 4 tasks

WELCOME PACKET SAMPLE: SECTION 5 - SCOPE AND DELIVERABLES

Write down what is included, what is outside the project, and how a change request will be handled. Keep this section specific enough that both sides can point back to it during the project.

INTAKE QUESTIONNAIRE HEAD

1. What would make this project feel successful?
2. What prompted the project now?
3. Who is the primary audience or user?
4. What should the audience understand or do?
5. What existing materials should we keep?
6. What must change from the current experience?

The complete workbook adds the 28 individual checklist tasks, all intake prompts, the 12-section packet structure, four emails, the 45-minute agenda, portal setup, five service-type guides, and the scope document.