

THE FIRST 30 DAYS

The client-onboarding checklist that keeps clients coming back.

Whether a client stays for one project or ten years is mostly decided in the weeks right after they say yes. This is the checklist for those weeks.

A new client is asking one silent question in their first month: **“Did I make a good decision?”** Everything you do (or don’t do) in these thirty days answers it. Run this checklist for every new client. The goal is simple — replace their quiet doubt with visible proof they chose the right firm.

DAY 1**The welcome that means something**

First 24 hours — confirm the decision immediately.

- ☐ A real, human welcome — not an automated confirmation.
A short personal note from the person they’ll actually work with beats any branded template.
- ☐ Tell them exactly what happens next, and when.
Uncertainty is where doubt grows. A simple “here’s the plan for week one” removes it.
- ☐ Name their main point of contact — one person who owns the relationship.
The client should never wonder “who do I even call?”
- ☐ Put the first real milestone on the calendar.
A concrete next step, scheduled, signals momentum from the first day.

WEEK 1**The first win**

Days 2–7 — show value fast, before doubt sets in.

- ☐ Deliver one small, visible win in the first week.
Not the whole engagement — one early result that makes them feel progress. Momentum beats perfection here.
- ☐ Have a real kickoff conversation, not just a form.
Learn what success looks like to them, in their words. Write it down where your team can see it.
- ☐ Make sure they know how to reach you — and that you reply fast.
Fast response in week one sets the tone for the whole relationship.
- ☐ Capture the personal details that matter.
What they care about, how they like to work, what keeps them up at night. This is where a real relationship starts.

WEEKS 2–3**Building the habit**

Days 8–21 — turn a new client into a settled one.

- ☐ Set a predictable rhythm of contact.
They should never sit wondering whether you've forgotten them. Regular, expected check-ins build safety.
- ☐ Ask how they're feeling, not just what's done.
A quick "how's this going for you so far?" surfaces doubt while you can still fix it.
- ☐ Introduce them to the wider team.
A relationship with only one thread is fragile. More than one face makes it durable.
- ☐ Keep the relationship in one place your whole team can see.
It should live in a shared system, not in one person's memory — so nothing slips when people are busy.

DAY 30

The check that changes everything

End of month one — confirm the decision, out loud.

- ☐ Hold a deliberate 30-day check-in.
Not a status update — a real "are we delivering what you hoped?" conversation. Almost no firm does this. It's unforgettable when you do.
- ☐ Ask directly: is this meeting your expectations?
You want to hear the small doubts now, not discover them when the engagement ends.
- ☐ Name what's next — the path for the coming months.
A client who can see the road ahead stays on it.
- ☐ Note the first opening for more work or a referral.
A happy 30-day client is your warmest source of new business — mark where it might come from.

The one rule underneath all of it

Every item here does the same job: it replaces silence with attention. A new client's doubt grows in the gaps — the unanswered email, the slow start, the feeling of being handed off and forgotten. Close the gaps and the doubt has nowhere to grow. Knowing what to do is the easy part; doing it consistently, for every client, without it living in one person's head, is the hard one — a systems problem, and exactly what a good relationship-and-growth system is built to carry for you.

THE PAYOFF

Keeping a client is far cheaper than winning one.

Winning a new client is expensive — the pitching, the proposals, the chase. Keeping one you've already won is nearly free, if you get the first thirty days right. Every client who reaches month one feeling confident is a client who stays, comes back for more, and sends others your way. The work you do in these four weeks pays back for years.