

INKLINE

Client Binder Kit

The first two weeks of a client engagement, on paper.

20 pages · Letter · Print or write in Preview / Acrobat

INSIDE THIS KIT

Sample: cover + onboarding checklist

Full kit: 20 pages after purchase

PAGE 03 IN THE FULL KIT

Onboarding checklist

Use this before the kickoff call. Check an item only when it is actually done — not when you meant to do it.

Before the first meeting

- ☐ Proposal or email scope is saved as a PDF in the client folder
- ☐ Signed SOW / agreement is filed (or a written go-ahead is saved)
- ☐ Deposit invoice is sent; payment is confirmed or a date is on the calendar
- ☐ A shared folder exists (Drive, Dropbox, or the client's system)
- ☐ Kickoff is on both calendars with a video link and a 60-minute hold
- ☐ Intake form is sent, or this packet is printed for the call

In the first week

- ☐ Intake is complete: contacts, billing, tools, brand files
- ☐ Access is granted: analytics, CMS, ads, repo, or accounts needed
- ☐ Success looks like _____ is written down in their words
- ☐ Communication rules are agreed (where, how fast, who decides)
- ☐ First deliverable and first invoice date are on the timeline

Before the first invoice (after deposit)

- ☐ Line items match the SOW language, not a private nickname
- ☐ Purchase order or billing reference is on the invoice if they need one
- ☐ Net terms and late-fee note match the agreement

The full Client Binder Kit (20 pages) adds intake forms, kickoff notes, SOW cover, invoice, payment schedule, change log, welcome letter, and close-out.