



Client Onboarding Checklist

Everything we need from you to get your project started.
Complete this checklist and we'll handle the rest.

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Your Onboarding Checklist

Please gather the following items. Don't worry if you don't have everything — we'll guide you through it.

How this works: After purchasing your package, review this checklist and send us whatever you have ready. We'll schedule a kickoff call to walk through anything you need help with. The more you have ready upfront, the faster we can launch.

1 Business Information

Basic details about your business

- ☐ Your full legal name
- ☐ Business name (or ideas if not finalized)
- ☐ Business type (LLC, sole proprietor, corp, etc.)
- ☐ State of formation
- ☐ EIN number *(if you already have one — we can help if not)*
- ☐ Brief description of your business / what you offer
- ☐ Target audience / ideal customer description

2 Branding & Design Preferences

Help us understand your visual style

- ☐ Existing logo files *(if you have one — PNG, SVG, or AI preferred)*
- ☐ Brand colors you like *(hex codes or examples)*
- ☐ 2-3 websites you admire *(for style reference)*
- ☐ Preferred fonts or typography style *(optional)*
- ☐ Any brand guidelines you already have *(optional)*

Tip: Don't have branding yet? No problem — that's what we do. Just send us examples of styles you like and we'll create something custom for you.

3 Website Content

Text and media for your website

- ☐ About you / your story *(a few paragraphs or bullet points)*
- ☐ List of services or products you offer
- ☐ Pricing information *(if you want it displayed)*
- ☐ Professional photos *(headshots, product photos, workspace — or we'll use stock)*
- ☐ Testimonials or reviews *(if you have any)*
- ☐ Business hours and location
- ☐ Contact information (phone, email, social links)

4

Domain & Technical

Where your website will live

- ☐ Preferred domain name *(e.g., yourbusiness.com — we'll check availability)*
- ☐ Existing domain login credentials *(if you already own a domain)*
- ☐ Existing hosting credentials *(if applicable)*
- ☐ Google account for Google Business Profile
- ☐ Social media account logins *(if you want us to set up profiles)*

5

Growth & Automation (Launch Pro & Growth Engine only)

For CRM, email, and automation setup

- ☐ Current CRM or email tool *(if any — HubSpot, Mailchimp, etc.)*
- ☐ Email list or contacts to import *(CSV or spreadsheet)*
- ☐ Intake form questions *(what you want to ask leads/clients)*
- ☐ Follow-up email content or tone preferences
- ☐ SMS follow-up preferences *(Growth Engine only)*

Tip: Not sure about automation yet? We'll walk you through the best setup for your business on our kickoff call. Just have your goals ready.