

# Client Onboarding Checklist



## Personalize the Experience From Day One

- Use intake forms to collect client goals, preferences, and personal details like birthdays and communication preferences.

## Welcome Them with a Human Touch

- Send a personalized video or voice message from a team member welcoming them to your practice.

## Build Confidence Through Education

- Provide a welcome kit with appointment expectations, practitioner bios, and educational materials relevant to their wellness journey.

## Set Clear Expectations and Next Steps

- Outline the full client journey using StoryBrand principles, including next steps, expected outcomes, and clear contact information.

## Make Booking and Rescheduling Effortless

- Ensure your system offers online booking, rescheduling, secure payment links, and HIPAA-compliant communication, all mobile-friendly.

## Create Moments of Delight

- Add small surprise-and-delight touches such as wellness gifts, handwritten notes, or follow-up calls post-appointment.

## Prime Them for Referrals and Reviews

- Include a gentle nudge for referrals and reviews in your follow-up, setting up future NPS surveys and testimonial requests.