Client onboarding desk

A practical kit for welcome sequence, asset request list, kickoff agenda.

This is a mock PDF describing a proposed product. It does not contain the promised guide, activities or templates. The product is not on sale.

What it is

Client onboarding desk is a focused, self-guided planning kit for independent designers, writers and consultants. It organizes welcome sequence, asset request list, kickoff agenda into a practical workflow, with editable worksheets and a completed fictional example. Start with your own situation, make the decisions on the worksheets, and finish with a plan you can revisit. The completed example illustrates the method; it is not a customer result.

Who it is for

Independent designers, writers and consultants

What you will make

Create a working set of welcome sequence, asset request list and kickoff agenda, tailored to your own project.

Proposed one-time price

USD 32.00 / EUR 29.00 / GBP 25.00 / CAD 45.00

AUD 49.00 / CHF 28.00 / AED 119.00

Fixed prices by currency, not live exchange conversions. Final prices and tax treatment will be confirmed before sales open.

Inside the planned edition

01 Welcome sequence: a purpose-built worksheet with field explanations and prompts.

02 Asset request list: a purpose-built worksheet with field explanations and prompts.

03 Kickoff agenda: a purpose-built worksheet with field explanations and prompts.

04 A start-here guide explaining the sequence, preparation and completion criteria.

05 A completed fictional example showing how the welcome sequence connect to the asset request list.

06 A final review checklist, reusable blank copies and a short troubleshooting section.

How to use it

Read the start-here guide, gather your project notes, complete the welcome sequence, then work through the asset request list and kickoff agenda. Compare with the fictional example and finish with the review checklist. Reuse the blank worksheets for the next project.

Planned formats and language

Planned: accessible PDF guide, editable DOCX worksheets and a printable A4/US Letter workbook. English-led instructions. Persian text is included where specified; the interface language does not change the purchased edition.

License

One organization, up to 10 internal users. You may share completed outputs with your own clients or participants. Do not resell, sublicense or distribute the blank source files.

Not included

No live service, consulting, external subscriptions, physical materials or completed work on your behalf. Specialist legal, medical and financial advice is not included.

Delivery, receipts and support

When the final edition is released: verified payment unlocks the purchased files in My purchases and creates an itemised billing document. Access uses private, expiring download links. Five downloads per file; contact support for access problems. Server access records support delivery enquiries.

Customer reviews

No customer testimonials yet. Reviews will come from verified purchasers who consent to publication. No illustrative quote is presented as a customer experience.