
New Client On-Boarding Checklist

- ☐ Coaching Agreement
- ☐ Set up Payment Gateway
- ☐ Calendar link
- ☐ Book in the first session with a link to where it will be held if needed (Zoom, Skype etc.)
- ☐ Intake form (to be filled before the first session, or you use this form in your first session as intake session or in a discovery session)
- ☐ Welcome Letter: include guidelines on how to get in touch with you in between sessions
- ☐ Additional Resources: welcome pack, assessments, gifts