Client Onboarding Checklist Pack

Five client onboarding checklists (the web design brief in two parts), condensed to check-off items — no reasoning column here, that lives on each guide's own page (linked at the end of each section). Free from briefgate.dev.

1. Web Design Brief, Part 1: Questions Before Design Starts

Any website project — ask before design starts

BUSINESS AND GOALS

☐ What does this site need to accomplish in the first six months?
☐ What is the single action you want a visitor to take?
☐ Who are your two or three biggest competitors, and what do you like or dislike about their sites?
☐ What's driving this project now — a rebrand, a broken old site, a new business, something else?
☐ What would make this project a failure, even if the site looks great?
☐ Do you already use analytics, a CRM, or an email platform that this site needs to connect to?

AUDIENCE

☐ Who is your ideal customer?
☐ What device do most of your visitors use — mostly phone, or mostly desktop?
☐ What questions do people ask before they buy or book with you?
☐ What makes someone hesitate to choose you over a competitor?
☐ Is this site mainly for new customers, existing ones, or both?

BRAND AND STYLE

☐ Do you have an existing logo and brand guidelines?
☐ Name three websites you like the look of, and say why.
☐ Pick three words for how you want the brand to feel.
☐ Any colors, fonts, or styles you specifically want to avoid?
☐ Do you have brand fonts already, or should we choose them?
☐ Is there an existing style guide, or files from a previous designer, we should see?

CONTENT

☐ Do you have your own copy ready, or do you need copywriting help?
☐ What pages does the site need — home, about, services, contact, blog, others?
☐ Do you have product or service descriptions ready to go?
☐ Do you have professional photos, or will this need a shoot or stock images?
☐ Do you have testimonials, reviews, or case studies we can use?
☐ What are your opening hours, service area, and pricing structure, if public?
☐ Do you have a privacy policy and terms of service already, or do these need drafting?

TECHNICAL

☐ Do you already have a domain, or does one need to be registered?
☐ Is there an existing site being replaced? What needs to carry over — page URLs for SEO, email accounts, a redirect plan?
☐ Do you have a platform preference — WordPress, Shopify, custom-built, or no preference?
☐ Do you need e-commerce, bookings, or integration with a payment processor, calendar, or CRM?
☐ Who currently manages your hosting and business email, and will that change with this project?
☐ Do you want analytics or ad tracking set up (Google Analytics 4, a Meta pixel, etc.)?

TIMELINE AND BUDGET

☐ Is there a hard deadline — an event, a launch, a funding round, a trade show?
☐ What's the budget range for this project?
☐ Who has final sign-off on the design — one person, or a committee?
☐ How available will you be for feedback and approvals during the project?
☐ Do you want ongoing maintenance and support after launch, or a one-time build?

2. Web Design Brief, Part 2: Materials and Access

Any website project, once it's scoped

IDENTITY AND BRAND

☐ Logo file (SVG or high-res PNG)
☐ Brand colors (hex codes if they have them)
☐ Typography preference, if any
☐ Existing style guide or brand book

CONTENT

☐ Homepage headline and intro copy
☐ Secondary page copy (about, services, etc.)
☐ Photos (with a minimum count and resolution stated up front)
☐ Team bios and headshots
☐ Testimonials or reviews
☐ Video or other media assets

TECHNICAL ACCESS AND INTEGRATIONS

☐ Current website admin login, if one exists
☐ Domain registrar access or DNS delegation
☐ Hosting account access, if the project keeps existing hosting
☐ Analytics tracking ID (e.g. Google Analytics)
☐ Email marketing or CRM integration details
☐ Third-party booking, payment, or scheduling accounts

LEGAL AND BUSINESS

☐ Business name, address, and contact details exactly as they should appear
☐ Opening hours, service area, or other operational facts
☐ Pricing or service packages, if shown on the site
☐ Privacy policy and terms of service
☐ Industry-specific disclosures (health, finance, legal, alcohol)
☐ Sign-off on who has authority to approve the final site

Full guide with reasoning and timing for each item: briefgate.dev/docs/website-project-intake-checklist

3. Brand Design Brief Checklist

Logo and brand identity projects specifically

BUSINESS AND POSITIONING

☐ Where does the business sit on price and quality — budget, mid-market, or premium?
☐ Does the name need explaining, or does it need to be pronounced correctly on sight?
☐ Does this mark need to work as a standalone icon — app icon, social avatar, favicon — separate from the full logo?
☐ What single association should someone form in the first second of seeing it?

AUDIENCE

☐ Where will people most often encounter this mark first — a phone screen, a storefront, a business card, a highway sign?
☐ Does your industry have a visual convention your audience expects?
☐ Will the same mark travel across very different contexts — a formal invoice and a casual social post?

PERSONALITY AND VALUES

☐ Pick three words for how the mark should feel.
☐ Any words, colors, or shapes that would feel wrong for this brand?
☐ Name a brand outside your own industry whose personality feels close to what you want.

COMPETITORS AND REFERENCES

☐ Who are your two or three direct competitors, and what do you think of their logos?
☐ Is there a logo you admire, in any industry? What specifically do you like about it?
☐ Is there a logo, in your industry or not, that you actively dislike? Why?

USAGE AND FORMATS

☐ Where will this mark physically appear — packaging, a vehicle, signage, embroidery, a favicon, a social avatar?
☐ Does it need a horizontal lockup, a stacked lockup, and an icon-only version?
☐ Does it need to work in a single color and in reversed (light-on-dark) form?
☐ What is the smallest size it needs to stay legible at?

CONSTRAINTS AND EXISTING ASSETS

☐ Is there anything about the current logo that the business is known for and shouldn't lose?
☐ Has a trademark search been done, or does one need to happen before final designs are shown?
☐ Is there an existing tagline that needs to be incorporated into the lockup, or kept separate?

DELIVERABLES AND TIMELINE

☐ How many initial directions, and how many revision rounds, are included?
☐ What final file formats are needed — vector source, print-ready PDF, transparent PNG, a favicon?
☐ Who has final sign-off?
☐ Is there a hard delivery date, and what's driving it?

MATERIALS TO COLLECT ALONGSIDE THE ANSWERS

☐ The existing logo file, in whatever format the client has it
☐ An existing brand guide, if one exists, as a PDF
☐ Photos of the mark in its current physical contexts
☐ Screenshots or links for the competitor and reference logos
☐ A moodboard of likes and dislikes

Full guide with reasoning for each question: briefgate.dev/docs/logo-and-brand-design-brief-checklist

4. Mobile App Project Intake Checklist

App builds, iOS and Android

ACCOUNTS AND ACCESS

☐ Apple Developer Program enrollment, under the client's own identity
☐ Google Play Console developer account, under the client's own identity
☐ You added as a collaborator with a development role, not full account ownership
☐ Access to an existing app listing, if you're taking over a live app
☐ App Store Connect / Play Console API credentials, if automating builds or releases

IDENTITY AND STORE LISTING ASSETS

☐ App name and app icon source file
☐ Store description (short and long, per store's format)
☐ Screenshots or the raw material to produce them
☐ Category and search keywords
☐ Support URL and privacy policy URL

CONTENT

☐ Which languages the app needs to support
☐ In-app copy — onboarding text, screen labels, empty states, error messages
☐ Licensed media (stock photos, icon sets, fonts) the client has rights to
☐ Legal text that has to live inside the app itself (a terms acceptance screen, disclaimers)

INTEGRATIONS AND CREDENTIALS

☐ API keys for any service the app's core function depends on (maps, payments, a booking system)
☐ Backend or CMS credentials, if the app talks to an existing system
☐ Push notification credentials (an APNs key for iOS, a server key for Android)
☐ Payment processor account, under the client's own name, if the app takes payments
☐ Social login app credentials, if "sign in with..." is planned

LEGAL AND COMPLIANCE

☐ Privacy policy
☐ What user data the app actually collects and why
☐ Terms of service
☐ Age rating questionnaire answers (violence, user-generated content, gambling elements, etc.)
☐ Industry-specific disclosures (health data, financial services, children's apps)

TESTING AND RELEASE

☐ Minimum OS version and device range to support
☐ Email addresses for internal testers (TestFlight, Play internal testing track)
☐ Expectations for analytics or crash reporting
☐ A hard release date, and what's driving it
☐ Who has final sign-off to submit to the stores

Full guide with reasoning and timing for each item: briefgate.dev/docs/mobile-app-project-intake-checklist

5. E-Commerce Website Intake Checklist

Online stores

PRODUCTS AND CATALOGUE

☐ Full product list with names and short descriptions
☐ Categories and how they nest
☐ Variants (size, color, material) and their structure
☐ SKU or another unique product identifier
☐ Product photos, per product or variant
☐ Full product count, even an estimate

PRICING AND TAX

☐ Price per product, gross or net of tax
☐ VAT rate per product or category, if it varies
☐ Currency and which countries are served
☐ Discount and promotion rules, if planned at launch
☐ Business registration details for invoices

MEDIA

☐ Product photos meeting a stated minimum resolution
☐ Category or banner images for homepage/landing pages
☐ Size charts or fit guides, for apparel and similar goods
☐ Product videos, if used

LOGISTICS AND PAYMENTS

☐ Payment methods to accept
☐ Payment gateway account, verified and approved
☐ Shipping carriers and rate structure
☐ Carrier account credentials, if rates or labels are fetched live
☐ Product weights and dimensions
☐ Fulfillment process (in-house, third-party warehouse, dropshipping)
☐ Return and exchange policy specifics

LEGAL AND COMPLIANCE

☐ Terms of service and a return/withdrawal policy
☐ Privacy policy and cookie consent
☐ Industry-specific restrictions (age-restricted or regulated goods)
☐ Complaints/claims process, where locally required

ACCOUNTS AND ACCESS

☐ Domain, hosting, and DNS access
☐ Payment gateway API keys, once approved
☐ Shipping carrier account access, if integrated
☐ ERP, accounting, or inventory-system access, if syncing is needed
☐ Marketplace or social-commerce accounts, if products list elsewhere

MARKETING

☐ Analytics and ad-tracking IDs
☐ Email marketing or abandoned-cart tool details
☐ Planned launch promotions or discount codes

Full guide with reasoning and timing for each item: briefgate.dev/docs/ecommerce-website-intake-checklist

6. Bookkeeping and Accounting Client Onboarding Checklist

Bookkeeping and accounting engagements

BUSINESS AND ENTITY INFORMATION

☐ Legal business name and entity type
☐ Registration and tax ID numbers
☐ Formation documents (articles of incorporation, operating agreement, or local equivalent)
☐ Primary contact and who has signing authority
☐ Fiscal year end and accounting method (cash or accrual)

FINANCIAL HISTORY

☐ Prior year financial statements, if any exist
☐ Prior year tax filings, if switching from another preparer
☐ Existing chart of accounts, if the client already uses accounting software
☐ Outstanding invoices or bills, if taking over mid-year

BANK AND TRANSACTION ACCESS

☐ Bank and credit card statements for the period you're picking up
☐ Read-only (view-only) access to the accounts you'll reconcile against, where the bank offers it
☐ Confirmation that no personal spending runs through a business account, or a plan to separate it

PAYROLL AND EMPLOYEE RECORDS, WHERE APPLICABLE

☐ Employee or contractor list, with pay rates
☐ Prior payroll reports for the current year, if taking over mid-year
☐ Access to the payroll system in use, if the engagement continues using it

AUTHORIZATION AND SCOPE

☐ A signed engagement letter naming what's in scope and what isn't
☐ Written authorization to represent the client with the relevant tax authority, if in scope
☐ Which software the business currently uses, if any, and whether the engagement continues it

Full guide with reasoning and timing for each item: briefgate.dev/docs/bookkeeping-client-onboarding-checklist

Free checklist pack from briefgate.dev/docs/client-onboarding-checklist-pack — adapt freely for your own projects. Turn any list into an automated client intake at briefgate.dev.