📄 Client Onboarding Checklist

Title: Client Onboarding Checklist
Subtitle: Step-by-Step Guide to Getting Started with Voxvita

✅ Before Kickoff

- ☐ Prelimary NDA Sent
- ☐ Signed contract or agreement
- ☐ Contact list for all stakeholders
- ☐ Preliminary goals and KPIs submitted
- ☐ NDA (if applicable) returned
- ☐ Access to systems/tools shared (ERP, CRM, etc.)

🚀 Kickoff Session

- ☐ Welcome call scheduled and conducted
- ☐ Voxvita walkthrough: platform or service overview
- ☐ Key workflows and integration points reviewed
- ☐ Support process explained (tickets, escalation)

🧩 Implementation & Setup

- ☐ Data collection completed (templates if required)
- ☐ Custom settings or workflows configured
- ☐ Training materials shared or demo scheduled
- ☐ Client team added to internal Slack/portal/email list

🔍 Review & Launch

- ☐ Test cases validated
- ☐ All users trained
- ☐ Final walkthrough completed
- ☐ Project sign-off

Need help at any step? Email support@voxvita.com