THE QUIET PROTOCOL

# Bookkeeping Client Onboarding Checklist

A free onboarding checklist for bookkeeping and accounting firms that want smoother handoff from signed client to clean first-month setup.

Bookkeepers, firm owners, onboarding leads, and client success admins

## GUIDE

A free onboarding checklist for bookkeeping and accounting firms that want smoother handoff from signed client to clean first-month setup.

## WHAT THIS ASSET COVERS

- A setup checklist for records, software access, deadlines, and communication norms
- Prompts for first-week client expectations and missing-document follow-up
- A handoff structure between sales, onboarding, and delivery teams

## USE THIS WHEN

1. New clients are sold but start messy
2. Different team members onboard clients differently
3. You want cleaner client confidence in the first month

## WORKING ASSET

## BEFORE KICKOFF

- signed agreement received
- billing method set
- primary contact confirmed
- software stack identified

## ACCESS AND RECORDS

- bank and card feeds
- accounting software access
- prior-period reports
- payroll and tax contacts if relevant

## EXPECTATION SETTING

- monthly close timeline
- client response deadlines
- document upload process
- first-review meeting date

## INTERNAL HANDOFF

- owner assigned
- missing items flagged
- first 30-day success checkpoint set

## DEPLOYMENT NOTES

## HOW STRONG TEAMS ACTUALLY USE THIS ASSET

- Assign one accountable owner instead of letting "Bookkeeping Client Onboarding Checklist" become shared but unmanaged work.
- Use it with bookkeepers, firm owners, onboarding leads, and client success admins in a weekly rhythm so the asset drives decisions rather than sitting in a folder.
- Decide in advance what counts as green, watch, and red performance so the team knows when to escalate.
- Capture learnings directly in the document every week so the asset becomes smarter over time instead of resetting to zero.

## BEST DEPLOYMENT SEQUENCE

- New clients are sold but start messy
- Different team members onboard clients differently
- You want cleaner client confidence in the first month

## WHAT SEPARATES A SERIOUS VERSION FROM A BASIC TEMPLATE

- Clear ownership for every step, not generic advice without accountability.
- Targets, thresholds, or decision rules that tell the team what good looks like.
- Specific working components: A setup checklist for records, software access, deadlines, and communication norms, Prompts for first-week client expectations and missing-document follow-up, A handoff structure between sales, onboarding, and delivery teams.
- A built-in review cadence so the document becomes part of operations rather than a one-time download.