New Client Onboarding Checklist: Connor Technology Labs

1. Administrative & Legal

- [ ] **Fully Executed Agreement:** Ensure the *Professional Services Agreement* is signed by both parties.
- [ ] **Statement of Work (SOW):** Ensure the specific *SOW* for this project is signed.
- [ ] **Initial Invoice:** Confirm receipt of the 50% deposit (or first month's retainer).
- [ ] **Point of Contact:** Identify the primary person for technical approvals and the person responsible for billing.

2. Cloud & Infrastructure Access

As per the agreement, the client should own these accounts, and you should be added as a "Developer" or "Admin" via IAM.

- [ ] **Cloud Provider Access:** (AWS, Azure, or GCP) Grant access to the Consultant's professional email.
- [ ] **Domain Registrar:** Access to GoDaddy, Namecheap, etc., for DNS configuration.
- [ ] **Existing Database:** Connection strings, VPN requirements, or SSH keys for legacy data.
- [ ] **GitHub/Bitbucket:** Access to existing repositories (if migrating legacy code) or a new repo created under the client's organization.

3. Third-Party Service & API Access

Identify which tools will be integrated into the new architecture.

- [ ] **AI/LLM Providers:** (OpenAI, Anthropic, etc.) Confirm the client has an active API key and billing set up.
- [ ] **Transactional Email:** (SendGrid, Mailgun, AWS SES) Access for app notifications.
- [ ] **Payment Processing:** (Stripe, PayPal) Sandbox/Developer access for app integration.
- [ ] **Analytics/Monitoring:** (Google Analytics, Sentry, Datadog) Access for tracking.

4. Technical Discovery (The "Deep Dive")

- [ ] **Legacy Codebase:** Location of any Perl, PHP, or old SQL scripts that need to be audited.
- [ ] **Data Samples:** Non-sensitive samples of existing data to inform database schema design.
- [ ] **Brand Assets:** Logos, color palettes (HEX codes), and style guides for frontend development.
- [ ] **User Personas:** Brief description of who will be using the application (admins vs. customers).

5. Communication & Tools

- [ ] **Primary Channel:** Agree on Slack, Email, or a Project Management tool (e.g., Trello/Asana).
- [ ] **Meeting Cadence:** Schedule the "Kickoff Call" and recurring weekly/bi-weekly status updates.
- [ ] **Shared Drive:** Create a shared Google Drive folder for project documentation, diagrams, and assets.
