Client Onboarding Checklist

Use this checklist when signing up a new contractor client.

BUSINESS INFORMATION

Basic Details

- [ ] Business legal name: _____
- [ ] Business operating name (if different): _____
- [ ] Industry/Trade: ☐ HVAC ☐ Plumbing ☐ Electrical ☐ Roofing ☐ Other: _____
- [ ] Years in business: _____
- [ ] City/State: _____
- [ ] Primary service area (city/county): _____

Contact Information

- [ ] Owner name: _____
- [ ] Primary phone number: _____
- [ ] Email address: _____
- [ ] Business address: _____
- [ ] Website domain (if they have one): _____
  - ☐ They own it (need to point DNS)
  - ☐ Need to purchase ($12, add to invoice)

BRANDING ASSETS

Logo

- [ ] Logo file received (PNG or SVG preferred)
  - File name: _____
  - ☐ Transparent background
  - ☐ High resolution (300+ DPI)
- [ ] If no logo: ☐ Use text-based logo with business name

Colors

- [ ] Primary color preference: _____ (default: #234654 teal)
- [ ] Secondary color preference: _____ (default: #F5A05C orange)
- [ ] Or: ☐ Use default template colors

CONTENT

Hero Section

- [ ] Main headline: _____ Example: "24/7 Emergency HVAC Services in Atlanta"
- [ ] Subheadline: _____ Example: "Fast Response • Expert Technicians • Fair Pricing"
- [ ] Short description (2-3 sentences): _____

About Us

- [ ] About us paragraph (3-5 sentences about their business, experience, approach)

Services (List 8 services they offer)

- [ ] Service 1: _____
- [ ] Service 2: _____
- [ ] Service 3: _____
- [ ] Service 4: _____
- [ ] Service 5: _____
- [ ] Service 6: _____
- [ ] Service 7: _____
- [ ] Service 8: _____

Trust Badges (Choose 5 or use defaults)

Default options:

- [ ] 24/7 Emergency Service
- [ ] Licensed & Insured
- [ ] 20+ Years Experience
- [ ] Same-Day Service
- [ ] 100% Satisfaction Guaranteed
- [ ] Locally Owned & Operated
- [ ] Certified Technicians
- [ ] Free Estimates

Their choices:

1. _____
2. _____
3. _____
4. _____
5. _____

FAQ (3-5 questions customers always ask)

- [ ] Question 1: _____ Answer: _____
- [ ] Question 2: _____ Answer: _____
- [ ] Question 3: _____ Answer: _____
- [ ] Question 4 (optional): _____ Answer: _____
- [ ] Question 5 (optional): _____ Answer: _____

Service Areas (List all cities/neighborhoods they serve)

- [ ] Area 1: _____
- [ ] Area 2: _____
- [ ] Area 3: _____
- [ ] Area 4: _____
- [ ] Area 5: _____
- [ ] Area 6: _____
- [ ] (Add more as needed)

Business Hours

- [ ] Monday: _____
- [ ] Tuesday: _____
- [ ] Wednesday: _____
- [ ] Thursday: _____
- [ ] Friday: _____
- [ ] Saturday: _____
- [ ] Sunday: _____
- [ ] Or: ☐ 24/7 Emergency Service (all days)

VISUAL ASSETS

Photos Needed (Minimum Requirements)

- [ ] 1 hero image (high quality, 1920x1080 or larger)

- ○ ☐ Received
- ○ ☐ Will use stock photo
- ● [ ] 8-12 gallery images (their work, before/after photos)
  - ○ ☐ Received (___ photos)
  - ○ ☐ Will use stock photos
- ● [ ] 1 about us image (team photo or work photo)
  - ○ ☐ Received
  - ○ ☐ Will use stock photo

Photo storage location: /clients/[business-name]/images/

INTEGRATIONS

Phone/SMS (Twilio)

- ● [ ] What number should calls forward to? _____
- ● [ ] What's the best local area code for tracking number? _____
- ● [ ] SMS auto-response message (or use default): Default: "Thanks for contacting [Business Name]! We received your message and will call you back within 30 minutes. For immediate service, call us at [Phone]." Custom: _____

Google Integrations

- ● [ ] Google Business Profile URL: _____ Example: https://g.page/business-name
  - ○ This is needed for reviews embed
- ● [ ] Google Maps embed code: _____
  - ○ Go to Google Maps → Search business → Share → Embed a map → Copy HTML
- ● [ ] Or: ☐ Set these up for them (add $50 to setup fee)

PAYMENTS & AGREEMENTS

Billing

- ● [ ] Setup fee: $497 (or $0 if 6-month commitment)
- ● [ ] Monthly fee: $297
- ● [ ] Preferred payment method:
  - ○ ☐ Credit card (Stripe link)

- ○ ☐ ACH/Bank transfer
- ○ ☐ Invoice (Net 15)
- [ ] Billing email: _____
- [ ] First payment received: ☐ Yes ☐ Pending

Agreement

- [ ] Service agreement signed
- [ ] Start date: _____
- [ ] Launch target date: _____ (typically 48-72 hours)
- [ ] Monthly billing date: _____

TECHNICAL SETUP (Internal Use)

Accounts to Create

- [ ] Supabase project: _____
- [ ] Twilio number purchased: _____
- [ ] Vercel deployment: _____
- [ ] Domain configured: _____

Credentials (Store in PROJECT_SECRETS_REFERENCE.txt)

- [ ] Supabase URL: _____
- [ ] Supabase API keys: _____
- [ ] Twilio number: _____
- [ ] Vercel URL: _____

POST-SETUP

Deliver to Client

- [ ] Website URL: _____
- [ ] Tracking phone number: _____
- [ ] Dashboard login (if applicable): _____
- [ ] Instructions sent
- [ ] Training call scheduled (if needed)

Follow-up (48 hours after launch)

- [ ] Check form submissions working
- [ ] Check call forwarding working
- [ ] Check SMS auto-response working
- [ ] Client satisfied with site
- [ ] Any changes needed: _____

NOTES

Additional requests or special considerations:

_____

_____

_____

_____

CLIENT SIGNATURE

I confirm all information above is accurate and approve the website setup.

Client Name: _____ Signature: _____ Date: _____

Setup Time Estimate: 2-4 hours once all materials received

Checklist completed by: _____ Date: _____