

Client onboarding checklist

A day-by-day first week for every new client, so nothing depends on your memory.

Day 0 WITHIN A FEW HOURS OF PAYMENT

- ☐ Send a short, personal welcome message or video. Keep it to three action items at most.
- ☐ Send the coaching contract or waiver, and countersign it.
- ☐ Send the intake form and the login or app access.

Day 1 to 2

- ☐ Check the intake form is complete. Chase it if it is not.
- ☐ Run a baseline: measurements, a movement screen or starting photos.

Day 2 to 3 WITHIN 48 HOURS OF THE INTAKE

- ☐ Deliver the first-week program and the first nutrition or habit goals.
- ☐ Keep it modest. Give them an early win, not five sore days.

Day 3 to 5

- ☐ Set the check-in rhythm in writing: the day, the time and when you reply.
- ☐ Send a quick early nudge to catch anything already off.

Day 7

- ☐ Run the first check-in and name one early win out loud.
- ☐ Confirm the program and map out week two.

WHAT TO SEND AND ASK

Build these once

THE INTAKE FORM • ONE FORM, FILLED IN ONCE

- ☐ Goal
- ☐ Health and injury history
- ☐ Schedule: training days, session length, equipment or gym
- ☐ Food preferences
- ☐ Starting photos and measurements

THE WELCOME PACK

- ☐ How you work, and what to expect in week one
- ☐ Your communication policy: when they can message, and when you reply
- ☐ Their job: how many check-ins, how many training videos, what a great client does

THE FIRST CHECK-IN

- ☐ Keep the weekly check-in short enough to fill in under two minutes.
- ☐ Reply the same day. Acknowledge an effort and answer their question.
- ☐ Make one small change, so they see their answers lead to action.
- ☐ Missed check-in? Send a light nudge the same day.

These timings are a sensible default, not a law. Adapt them to your service and keep them the same for every client.

MAKE IT A SYSTEM

Automate the reminders. Keep the welcome and the day 7 reply personal.

Write down what you did for your next five clients, in order, and repeat it. In Strength Academy, our getting started guide covers the account, client invites and program setup.