

Client onboarding checklist

Before the consultation

CLIENT

DATE

COACH

PLANNED START

Illustrative 30-minute agenda

Adapt as needed

Min	Topic	Outcome
0-5	Expectations and reason for starting	What the client wants to change and why now
5-12	Experience and barriers	What worked and where plans usually break down
12-20	Schedule, equipment, inputs	When and where training is realistic
20-26	Scope and communication	What you provide, expect, and when you respond
26-30	Summary	Who will do what and by which date

Prepare before the call

- ☐ Send the purpose, duration, and location of the consultation.
- ☐ Request only information needed to deliver the service.
- ☐ Keep your intake form separate from official health screening.
- ☐ Prepare a concise description of scope and communication rhythm.
- ☐ Know the next action and its deadline after the consultation.
- ☐ Confirm who can access the record and where it will be stored.

PREPARATION NOTES

Client onboarding checklist

During the consultation

WHAT WOULD TELL THE CLIENT THAT COACHING IS WORKING?

PREVIOUS EXPERIENCE AND WHAT WORKED

BARRIERS AND BACKUP OPTION

REALISTIC DAYS AND TIME WINDOWS

EQUIPMENT AND ENVIRONMENT

WHAT THE SERVICE INCLUDES AND EXCLUDES

CHECK-INS, MESSAGES, AND RESPONSE TIME

Process and boundaries

- ☐ Official screening is used unaltered and follows its own instructions.
- ☐ A need outside the coach's qualifications leads to an appropriate referral.
- ☐ The client knows when they train independently and what to do if unsure.

NOTES WITHOUT UNNECESSARY PERSONAL DATA

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After the consultation

Confirm with the client

- ☐ The agreed goal and first review period.
- ☐ Realistic session frequency, days, and duration.
- ☐ Where the plan, session log, and check-in will live.
- ☐ Service scope, communication channel, and response time.
- ☐ Open questions and who will answer them.
- ☐ Delivery date for the first plan and first check-in date.
- ☐ The date you will verify that the process is clear.

Next actions

Owner	Action	Due

CLIENT SUMMARY

UNRESOLVED QUESTIONS

WELCOME MESSAGE AND FIRST-WEEK INSTRUCTIONS

SOCRA.FIT

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Build the client plan in Socra.fit and keep workouts, check-ins, and adherence together.

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