Client Onboarding



Client Onboarding Checklist for Portrait Photographers

Track your client onboarding process with this checklist. Whether you're integrating it into a CRM system or utilizing it as a Google Sheets document, this checklist ensures that important parts of your client's journey won't fall through the cracks. From initial consultations to session bookings, and from invoicing to post-session thank-you emails, this tool covers all essential touchpoints and ensures consistent communication and a professional experience for your clients at every stage.

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Client Onboarding Checklist

Client Information

- ❑ Client Name
- ❑ Contact Information (Phone, Email)
- ❑ Preferred Method of Communication
- ❑ Emergency Contact (for day of shoot)

Initial Consultation

- ❑ Schedule consultation meeting (in-person or virtual)
- ❑ Discuss client's vision and expectations
- ❑ Present portfolio and style
- ❑ Discuss pricing and packages
- ❑ Answer any questions the client may have

Booking

- ❑ Send booking proposal with package details
- ❑ Collect booking fee (if applicable)
- ❑ Confirm booking date and time
- ❑ Send booking confirmation email

Contract and Agreements

- ❑ Send contract for review and signature
- ❑ Include model release form (if applicable)
- ❑ Confirm receipt of signed documents

Pre-Session Planning

- ❑ Discuss wardrobe and styling
- ❑ Create and share session itinerary
- ❑ Discuss backup plan for weather or other unforeseen issues
- ❑ Send session day reminder (1-2 days prior)

Payment

- ❑ Send invoice for session fee
- ❑ Send payment confirmation and receipt

Session Day

- ❑ Pack all necessary equipment
- ❑ Arrive early to scout location
- ❑ Conduct session according to plan
- ❑ Thank client and let them know what to expect next

Post-Session

- ❑ Send thank-you email
- ❑ Provide estimated timeline for image delivery
- ❑ Edit and prepare proof images
- ❑ Send proof gallery for client review
- ❑ Finalize image selection and edits
- ❑ Order & receive printed projects from lab (if any)
- ❑ Deliver final images and/or prints
- ❑ Request feedback and/or testimonial
- ❑ Encourage referrals

Follow-Up

- ❑ Send follow-up email to ensure client satisfaction
- ❑ Offer incentives for repeat business or referrals
- ❑ Add client to email list for future promotions and updates (with permission)